

VISTA

Training Manual

Version 6.0.08

State of Utah: Department of Technology Services

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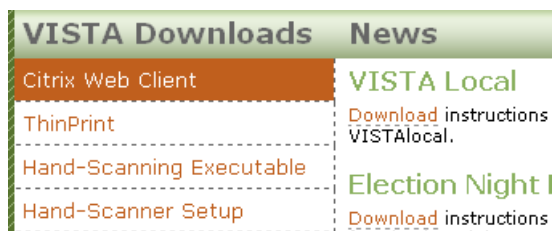
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VISTA Set-Up

Before you can log into VISTA, you will need to download some software that will allow you to connect to the system, print and use the hand scanner. To begin, go to www.vista.utah.gov to access the home page for VISTA and locate the download section to the left of the page. Download the following in this order:

Citrix Web Client: This is what allows you to connect to the database.

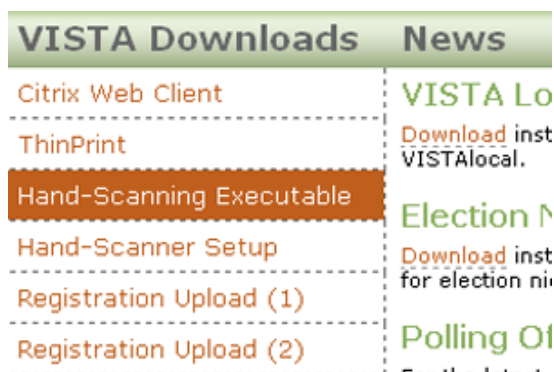
After selecting the Citrix Web Client button, you will select Run, Run, Yes, and Yes to the prompts that appear on your screen. In short, after selecting “run” twice, you will select the defaults. After installation you will need to close and reopen your web browser.



ThinPrint: ThinPrint allows you to print from our database to your printer.

Now that you've downloaded the Citrix client, you are ready to download the ThinPrint client. Select the ThinPrint button, run and run. After a few seconds, the ThinPrint install wizard will appear. Agree with default selections.

Hand-Scanning Executable: This zip file contains the necessary ingredients for using the hand-scanner. You will be using the hand-scanner to record voting history, capture signatures, manage absentee voters, petitions, etc. Both the hand-scanning executable and hand-scanner set up downloads pertain to the hand-scanner and have no effect on uploading scanned voter registration images to your database.



Select the hand-scanning executable button and select each of the defaults. When downloading the file, make sure that the file path says **c:\scanner**. This will create a folder where the files will be saved.

Hand-Scanner Set Up: This is a pdf that you will need to print off and scan to set the hand-scanner.

Installing the Drivers: Now we need to tie everything together. Make sure that the scanner is plugged into your USB port. Scan the pdf document. If the installation wizard doesn't appear, go to:

Start button of your computer > Control panel > System > Hardware > Device manager > Ports > Right-click IT 4600 Area Imager > Update driver.



1. Select "No, not this time" and the next button.
2. Select "Install from a list or specific location (Advanced)" and the next button.
3. Select the check box for "Include this location in the search" and browse to choose C:\scanner.
4. Select the finish button to complete installation.

Setting the Speed and Port Number For The Scanner: After updating the driver, you will still be viewing the device manager screen. If not, you will access this screen by going to:

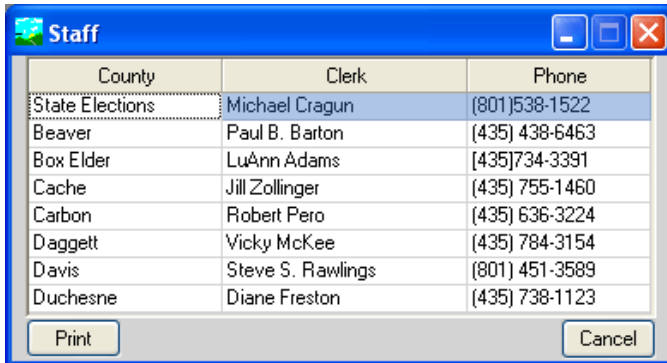
Start button of your computer > Control panel > System > Hardware > Device manager > Ports > Double-click on IT 4600 Area Imager. This takes you to the IT4600 Imager Properties screen. Then select the Port Settings tab. Select 38400 from the Bits per second drop down box. Then select the advanced button. Finally, select COM9 from the COM Port Number drop down box. Select OK to save your changes.



Remember! The bits per second must be set to 38,4000. After setting this, select the advanced tab and set your COM port number to COM9. Your scanner will not work without these settings.

Adding and Managing Staff Members

Before you can access VISTA, you must first have a user account. Anyone who has been given the necessary user rights to add staff will need to do this for you. In many cases, it will either be the elections administrator or county clerk. Contacting a member of the VISTA development and support team is also another option. To access the staff section, select the staff button at the top of the VISTA home screen.

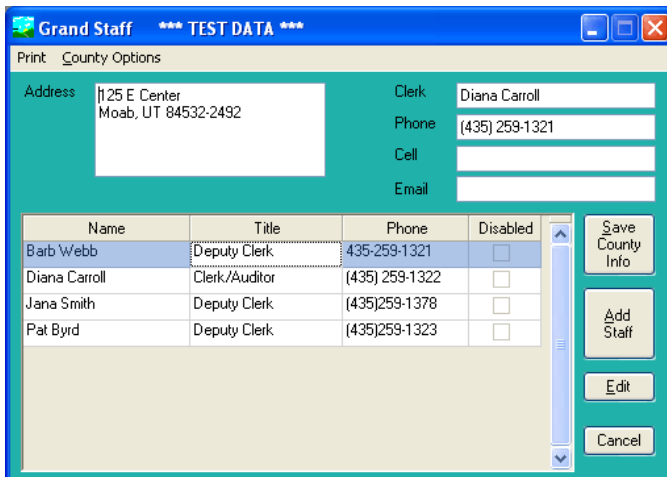


The Staff window displays a table with three columns: County, Clerk, and Phone. The first row is highlighted in blue.

County	Clerk	Phone
State Elections	Michael Cragun	(801)538-1522
Beaver	Paul B. Barton	(435) 438-6463
Box Elder	LuAnn Adams	[435]734-3391
Cache	Jill Zollinger	(435) 755-1460
Carbon	Robert Pero	(435) 636-3224
Daggett	Vicky McKee	(435) 784-3154
Davis	Steve S. Rawlings	(801) 451-3589
Duchesne	Diane Freston	(435) 738-1123

Buttons: Print, Cancel

To change a user's rights or any other information, select (double-click) on their name.



The Grand Staff window displays detailed information for a selected staff member and a list of other staff members.

Print County Options

Address: 1125 E Center Moab, UT 84532-2492

Clerk: Diana Carroll

Phone: (435) 259-1321

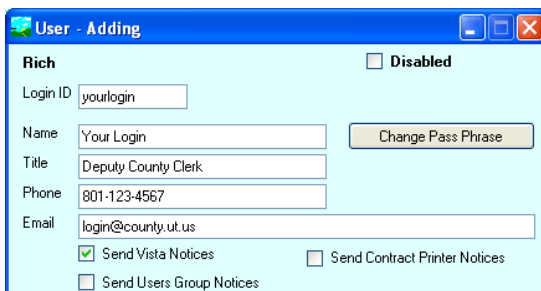
Cell:

Email:

Name	Title	Phone	Disabled
Barb Webb	Deputy Clerk	435-259-1321	<input type="checkbox"/>
Diana Carroll	Clerk/Auditor	(435) 259-1322	<input type="checkbox"/>
Jana Smith	Deputy Clerk	(435)259-1378	<input type="checkbox"/>
Pat Byrd	Deputy Clerk	(435)259-1323	<input type="checkbox"/>

Buttons: Save County Info, Add Staff, Edit, Cancel

To add a user, go to *Staff > Double-click on your county > Select the add staff button*. As you can see, you will need to add a username, the first and last name, title, phone number, and email address for the user. You will then select the "Change Pass Phrase" button to create a password.



The User - Adding window displays fields for user information.

Rich ☐ Disabled

Login ID: yourlogin

Name: Your Login

Title: Deputy County Clerk

Phone: 801-123-4567

Email: login@county.ut.us

☒ Send Vista Notices ☐ Send Contract Printer Notices ☐ Send Users Group Notices

Buttons: Change Pass Phrase

Assigning User Rights: The ability to view, make changes, save changes, and delete information in VISTA is controlled by rights. While you might have a backstage pass to access VISTA, where you can go and what you can do is a different matter. Let's review the four categories of user rights.

None: The user cannot access this section.

Read: The user can view the information.

Write: The user can make permanent changes to the information in your database.

Delete: The user can essentially do whatever they want. They can delete voters, precincts, etc.

The only people that should have "Users" rights are those approved to add people to the database.

Remember! After assigning rights in the live database, you will need to issue rights in the test database as well.

Practice: The best way to familiarize yourself with VISTA and its numerous processes is by practicing in the test database. Have the administrator give you "delete" rights. You don't have to worry about making mistakes in the test database.

Changing Your Password: If a user ever needs to change their password, they only have to go into their staff record and select the change pass phrase button.

Deleting a Staff Member: To delete a staff member, go to Staff > Select your county > Double-click on the staff members name > Select the delete button at the bottom of the form.

Emailing a VISTA User: There are two ways to email a VISTA user. You can either right-click on their name on the grand staff screen and select email or go into the users record and right-click on their email address and select the email option.

Printing Your Staff List: On your county staff screen, select the print button at the top of the form.

County Options: To save time and money, many counties will contract with a local printer to send out their voter ID and confirmation request cards. Selecting the county options button at the top of the grand staff screen will allow you to choose your printer from the drop down box and what functions you want them to perform for you. These options include sending out voter ID cards and confirmation requests.

Heads-up! After adding someone to the live database you will then need to add them to the test database.

For those who are new to VISTA or not as familiar with some of its processes, this is a great place to learn because the changes and mistakes that they make will have no impact on your live database. The person adding you only needs to click on the live database toggle button on the home screen of VISTA to access the test database. They then perform the same steps to add a user to the test database. They can use the same password and give you "Delete" rights to everything.

Voters: The Voter Search Screen

The screenshot shows the 'Voter Search' window with the title bar 'Voter Search *** TEST DATA ***'. The window has tabs for 'Search', 'Holding Area Search', 'State Wide Search F4', 'Enable Scanner', and 'Unregistered Provisional'. The 'Search' tab is active. Below the tabs are various search criteria fields: Last (Weddle), First (Eric), Middle, House #, Street, Birth Place, City, Zip, Date of Birth, Source (dropdown), Reg. Date From/To, SSN, Status (dropdown), How Registered (dropdown), ID #, Reason (dropdown), Precinct (dropdown), Old ID, County (Grand), Absentee (checkbox), Issued (checkbox), Party (dropdown), Verify Stat (dropdown), and Land Serial #. Below these fields is a table with columns: Name, Status, Address, City, County, Birth Date, and Reg. Date. The table contains one row: 'Weddle, Eric', 'Active', '10 N Main St', 'Moab', 'Grand', '2/20/1980', and '3/31/2008'. At the bottom left, it says 'Total: 1' and '1'. At the bottom right, there are buttons for 'Clear Search fields', 'Add', 'Search', and 'Cancel', along with a 'Confirmation Sent' checkbox.

Remember! To access a voter's record, double-click on it. You can also view other options by selecting the record (one mouse-click) and right-clicking.

There are a variety of ways to identify and search for a voter using the Voter Search screen. The Voter Search screen is accessed by going to *Voters > Voters*. Each field on the page can be used as search criteria. You can make your searches general by using fewer search criteria which will return a greater number of results or more restrictive by utilizing fields that require more specific information, such as someone's date of birth (DOB) or last four digits of their social security number. Regardless of which method you choose, the options are numerous.

After inserting your search criteria, select the search button at the bottom of the page or enter on your keyboard. The results of your search will appear in the table below. In addition, the number of results will appear in the lower left-hand corner of the form as well. To access a voter's record, double click on their record.

Tip: If you wanted to know how many people lived in a particular precinct, simply select a precinct from the precinct dropdown box and select search. For a more specific search that includes the number of active Republicans, select those options from their corresponding dropdown boxes (i.e. Status and Party).

Voter Search Screen Extras: There are a variety of searches that can be conducted from this screen by selecting the search button at the top of the form. For instance, you can search for pending, deceased, incarcerated, deleted, and inactive voters.

Tip! Once you have received a voter's registration card make sure to do a search on your pending voters. These are people who are waiting to be added to VISTA. To access their records go to *Voters > Pending Voters*. If you are on the Voter Search screen, select search and pending. After reading the instructions on adding a voter, you will be prepared to add these voters to your county without having to manually insert information into each field.

Holding Area Search: If a voter has been deleted or moved to the holding area, you can always bring them back by doing a search in the holding area. It's also a useful tool should you accidentally delete the wrong person. To bring them back into your active records, insert the search criteria and select the holding search button at the top or use the hot key Alt+H. Double-click on their record, insert their address, verify the address, and select save.

Unregistered Provisional: This is where you record voting history for unregistered provisional ballots.

Enable Scanner: If your scanner is not working, select this button to reset the scanner. If this doesn't do the trick, you might have installed a scanner that hasn't been set up on your computer or you haven't downloaded the necessary files. This is discussed in the VISTA set-up section.

Adding a Voter to VISTA

State Wide Search: Before adding anyone to VISTA, you will want to conduct a state wide search to see if they are already a registered voter. After inserting the voter's name and/or their date of birth, simply select the state wide search button in the navigation area at the top of the Voter Search screen. You can also select the F4 button or use the hot key Alt+W to initiate the search as well. This procedure will help to ensure that you are not adding a duplicate record to the database. It also makes it easier to add someone to VISTA, particularly if they are registered in another county.

The Registrant Is Not Found in VISTA: If the person is not already a registered voter select the add button at the bottom of the page. This will take you to the registrant adding screen. After completing the name information fields, insert their residence address.

Remember! In using the address of 500 East 2100 S, "2100" is the street. The street name is E 2100 S. If this street is already in VISTA and "500" falls within the set range, it will automatically verify. If not, you will be taken to another screen to make sure this street is in the right precinct.

Addressing: If someone's address was 500 E 2100 S, in Moab, UT 84532, "E 2100 S" would be the street name. When entering this into VISTA "2100" would also be the street that you would put into the street field. Since all addresses need to be verified, select the verify button to complete the process.

If the house number on this street falls within a range that has already been verified in the past, it will automatically verify the address. In other words, if the street East 2100 South is already in the system and its range has been verified from 1 to 700 and you are adding an address of 500, it will verify it because it knows what precinct it is in. If the new address doesn't verify, it is because the new house number is not within that range or the street has not been added. In addition, VISTA doesn't know if the new address is in the same precinct or not. If the new house number is in the precinct that appears as the default, select ok, if it isn't, select the correct precinct and save. You will then be taken back to the Registrant Adding screen.

If you need to add a mailing address, select the mailing address button and complete the form. All correspondence will be sent to a voter's mailing address.

The Bottom Half of the Form: After verifying your address, complete the bottom half of the form. The DOB, birth place, last 4 digits of the Social Security number and driver's license are required fields. When recording how the voter registered, you have three options (In-person, By-Mail and Unspecified). When choosing By-Mail, you can select the type of form that was submitted from the form drop down box that follows the "How Registered" field.

Requested Polling Official: If the voter has requested to be a polling official for an upcoming election, select the corresponding check box. This will include them in a pool of potential election workers to choose from when staffing your polling places.

Voter Information				Signature	Absentee Setup	Confirmations
Phone:	435-123-4567	Date of Birth:	02/20/1980	Birth Place:	San Diego, CA	
SSN:	123-45-6789	DL #:	123456789	DL State:	Utah	
Party:	Unaffiliated	How Registered:	By mail	Form:	Driver's License Office	
Disabled:	<input type="checkbox"/>	Status:	Active	Reason:		
Requested Polling Official:		<input type="checkbox"/>		Registration Date:	03/31/2008 Today 03/31/2008	
SSN Verified:		Naturalized:				
DL Verified:		Place:		Print Voter ID Card: <input checked="" type="checkbox"/>		
Status:	No Match	Date:		Needs ID: <input type="checkbox"/>		
<input type="button" value="Delete"/> <input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Save/Exit"/>						

Saving the Record: Select save to save your changes. Finally, select the ID Verification button at the top of the form or F3 to verify their social security number and drivers license. This is required of all new voters, but previous voters will not need to be verified. If the person was added to VISTA without any proof of identification, select the needs ID check box. They will then be asked for ID at the polling place before they are allowed to vote. To return to the Voter Search screen, select the save and exit button.

The Voter Is Currently in VISTA: If the voter that you are searching for is in VISTA, double-click on their record and update their address. After verifying their new address, their record will then be transferred to your county database. Then update the other corresponding fields and select save. It's as easy that. However, keep in mind that while you can add voters to your county from another county, you cannot put them back if you accidentally added the wrong person. If this should happen, you will have to contact the affected county.

Registrant Adding Screen Extras

District Office Holder: Have you ever had a voter call and request a listing of their elected officials? If so, simply look up their name, go into their record (double-click) and select district office holder. You can also save yourself a step by searching on their name, selecting their record with one mouse click, right-click on it, and select office holder. As you can see, there are also a few other options at your disposal by right-clicking, which we will talk about later.

Office	Office Holder	Address	Phone
President			
US Senate	Robert Bennett	Utah Office Wallace F. Bennett Federal Building 125 South State Street Suite 4225 Salt Lake City, Utah 84138-1188	(202) 224-5444
		Washington Office 431 Dirksen Building Washington, D. C. 20510-4403	
US Senate	Orrin Hatch	Utah Office	(202) 224-5251

Who Are My Elected Officials?
Search for the voter, right-click on their name and select Office Holder.

Other State: If someone has registered from another state, select the other state button. Fill out the form, include the voter's previous address and select save. An email will be sent to each state that consists of a list of voters who have registered in Utah.

Notes: You can manually enter notes on a voter by selecting Notes.

Print: This will allow you print the screen.

History: This includes historical information on a voter's record, residence, voting record, absentee, provisional, petitions, and applications image.

Duplicate Search: See if there are any duplicates for this particular voter.

Precinct Lookup by Address: Have you ever had a voter call to know what precinct that they are in? If so, it's as easy as going to *Voters > Precinct Lookup by Address > and inserting their address.*

County Voter Totals: This report will provide a breakdown of voters by status, residence, party, precincts, districts, and voters voting in an election. It is a quick and easy way to review your county statistics. If someone wants a detailed report, you will want to provide them with a public service request. To access this screen go to: *Voters > Totals > Select Statistics.* To print a screen, right-click and select print.

Adding and Modifying Streets and Street Segments

A street requires two critical components; the actual street name and the street/precinct segment. To add a street, go to precincting > street segments. Then select the add street button. After inserting your street information, select the add street button. You will then be taken to the street segment screen. This is where you will precinct the street that you have just added.

Keep in mind that a street can have one or many segments. Segments are defined by precinct boundaries and based on the address information in your database. As you add voters to the database and verify their addresses, these street segments are modified to reflect those changes.

Example: In our example, we will be using the street that we have just added. Polk Avenue is a lengthy street and cuts through 3 precincts. To add a segment, select the add segment button. Then select the precinct, minimum and maximum house numbers that the segment includes and what side of the street the segment includes.

Modify Precinct for - Polk Ave to include 100 *** TEST DATA ***

Print

Prec	Min	Max	Side
10:1	1	400	B
10:2	401	549	O
11:1	402	550	E

Buttons: Add Segment, Delete Segment, Undo Changes, Cancel, View Stats & Save

Visual representation of the street segments:

1 550 E

10:1 11:1

10:1 10:2

0

As it relates to Polk Avenue, precinct 10:1 ranges from house number 1 to 400 and lies on both sides of the road. Use the drop down box to designate whether the segment falls on the even, odd or both sides of the road. It's important to note that you can place your cursor in the segment above and make any changes after adding the segment. We can also see that precinct 10:2 extends from house number 401 to 549 and falls on the odd side of the road. Finally, we have precinct 11:1 that extends from house number 402 to 450 on the even side of the road.

Since this is a new street, no voters have been affected by changes. However, if I had gone into an existing segment and made modifications to a segment, voters within those segments could have been affected. For instance, if a voter lived on 410 Polk Avenue and I changed the minimum house number to be 420, that person and anybody else in the range of 400-418 would no longer be in a precinct. After making your changes, select the view stats and save button.

How can I tell if someone was left out?

After selecting the view stats and save button, you will have a listing of who is currently in and out of a segment. You will notice that you have two after changes tabs and two before changes tabs. If you have made changes to existing segments, make sure to select the unassigned addresses tab to see who was left out. You will then have their house numbers, which will allow you to modify the segments to include them. Every voter has to be in a segment. The before changes tab will give you the information that existed before changes were made. To make the changes complete, select the save changes and modify button. Once you have done this, everybody that now has a new precinct will be sent a new voter i.d. card.

Segment Change Statistics *** TEST DATA ***

Print

After Changes Unassigned Addresses Before Changes Unassigned Addresses

	Precinct	Min	Max	Side	Bldg Min	Bldg Max	Bldg Side	Homes	Voters
1	10:1	1	400	B					
2	10:2	401	549	O					
3	11:1	402	550	E					
4									
5				Totals				0	0
6									
7				Total				0	0
8				Not in				0	0
9									

Buttons: Cancel, Save Changes to, Save Changes and Modify

Street Modifications

There might come a time when you need to change the name of a street. To do this, you will need to go to utilities > addressing utilities > modify street names. Search for the name of the street. After locating the street, select it (one mouse-click), then right-click and select modify street name.

Streets with no residences

Street Information

Prefix: Name: Suffix: Type: City:

Zip Information

Zipcode Plus 4

Add Street

Known Streets for: main

Prefix	Street	Suffix	Type	From	To	City	Zip
N	Main		St	100	300	Annabella	84711-
S	Main		St	1	300	Annabella	84711-
N	Main		St	80	200	Aurora	84620-
S	Main		St	100	500	Aurora	84620-

Add new street or Double click to select from known streets

Search Cancel

Simply insert the new name and save the changes. To see the changes, you will need to conduct a new search to refresh the form. When viewing a street record, the “to” and “from” fields denote the house numbers that are in a particular zip code + four. These are set by the Post Office.

Street Prefix: Street: Street Suffix: Type:

From: To: City: Zip:

Cancel Save

Deleting a Street

If you need to delete a street, select the street that you want to delete (one mouse-click), right-click and select delete. You will notice that you now have an orange box that states “Select street to move residences to.” Finally, double-click the street that you want to move the voters to. This process ensures that the voters who lived on the street that was just deleted will be assigned a new street.

Add Street *** TEST DATA ***

Streets with no residences

Street Information

Prefix:

Name: 100

Suffix: Type:

City:

Zip Information

Zipcode

Plus 4

Select Street to Move Residences

Known Streets for: 100

Prefix	Street	Suffix	Type	From	To	City	Zip
E	100	N		35	225	Annabella	84711-8001
E	100	N		315	480	Annabella	84711-8001
E	100	S		0	100	Annabella	84711-
N	100	E		0	100	Annabella	84711-

Add new street or Double click to select from known streets

Search Cancel

Eliminating Duplicate Voters: Duplicate Voter Check

Eliminating duplicate voter records and outdated voter information is critical to maintaining an accurate and clean database. There are a variety of ways to achieve these two goals. The first is through the duplicate voter check process. To run this utility, go to Utilities > Voter Utilities > Duplicate Voter Check. Select search. The records that you are looking at are the duplicates within your county. To make it easier to follow, possible duplicates are separated by white and green colors.

Name	Status	Address	City	County	Birth Date	Reg. Date
Acevedo, Sally	Active	50 S 200 E	Salina	Sevier	11/23/1980	10/10/2007
Acevedo, Sally	Active	110 N 300 E	Salina	Sevier	11/23/1980	02/28/2006
Adams, Sarah	Active	495 Sunny Brook Dr	Salina	Sevier	10/19/1960	09/05/2007
Adams, Sarah	Active	495 Sunny Brook Dr	Salina	Sevier	10/19/1960	10/08/2007

Exclusions:

☐ Last Name: ☐ Birthdate:

☐ First Name: ☐ Status:

Total: 4

☐ State ☒ County

Starting the Merge Process: Due to the fact that you cannot undo a merge, you will want to first compare their date of birth, drivers license information and social security number. To start the process, select one of the two files (one mouse-click) and then select the merge button below or you can right-click and select the merge option that appears. You will then view a screen that resembles the one below.

Voter Merge *** TEST DATA ***

Voter Info | Absentee and Mailing | Images

Voter one

Name Suffix: Private: ☐ Search: ☒ US Citizen: ☒ ID: 133022

Last: Acevedo First: Sally Middle:

Address: 110 N 300 E Precinct: 25.1

City: Salina Zip: 84654-1230 Old ID:

Phone: Date of Birth: 11/23/1980 Birth Place:

SSN: 1234 Signature: DL #: 123456789 DL State: Utah

Party: Unaffiliated How Registered: Unspecified Source: Driver's License Office

Disabled: ☐ Status: Active Reason:

Absentee: ☐ Registration Date: 2/28/2006 2/28/2006

Voter two

Name Suffix: Private: ☐ Search: ☒ US Citizen: ☒ ID: 615728

Last: Acevedo First: Sally Middle:

Address: 50 S 200 E Precinct: 15.1

City: Salina Zip: 84654-1317 Old ID:

Phone: 435 Date of Birth: 11/23/1980 Birth Place: UT

SSN: 1234 Signature: DL #: 123456789 DL State: Utah

Party: Unaffiliated How Registered: Imperson Source: Driver's License Office

Disabled: ☐ Status: Active Reason:

Unknown: 6/12/2006 Absentee: ☐ Registration Date: 10/10/2007 6/12/2006

To maintain the most up to date information you will want to merge the old record into the new record. However, before you merge the records you can right-click on most of the form fields and drag that information to the form field of the record that you are merging to.

For instance, if the new record didn't have a phone number, but the old record did, you would right click on the telephone number and drag it to the new record and drop/release it. After getting all of the information that you need, choose the "select this voter" button on the registration record that you are merging to (i.e. the newest record). Before you finalize the process, make sure to select the absentee mailing and images tag. When selecting information on these two tabs, simply select the information that you want from the top or bottom image., regardless of whether it is the newest form or not.

Merging Voters Within Your County Using the Voter Search Screen

As stated earlier, when adding a voter to VISTA, you should always insert their name and do a state-wide search to see if they are already registered in another county. If they are, go into their record, add their new address and verify their address. Verifying their address will import them into your county. Then complete the rest of the form. However, if by chance you add them and you realize that you have a duplicate voter record for them, you can merge the duplicates in the voter search screen.

Name	Status	Address	City	County	Birth Date	Reg. Date
Bosshardt, Mindy	Active	225 N 100 E	Redmond	Sevier	8/7/1965	8/25/2004
Bosshardt, Mindy	Active	35 W 300 N	Redmond	Sevier	8/7/1965	10/31/2000

The process is the same one that you would use when using the duplicate check tool. Select one of the two records (one mouse-click) > Right-click > Select voter merge > Make sure they are the same people by comparing their social security number and date of birth > Update any information > Merge.

If VISTA doesn't recognize the second record as a close match, you will need to select the search button on the bottom record that is empty. It will take you back to the voter search screen. Find the person and double-click on their name. This will take you back to the merge screen.

Pending Voters: Voter Registration Forms from the DMV

When you receive a voter registration record from the DMV, you can go to the pending voters database to enter them into VISTA. You can get there one of two ways. The easiest is probably selecting Voters > Pending Voters on the home screen. If you are in the voter search screen, select Search > Pending. Once you locate their record, you will be able to add them to your county.

A note about colors. Any name that appears in orange is someone who is already in your county. A white record means that this person is not in your county.

White Record: To add a pending voter who has a white record, simply go into their record, verify their address and select the save and exit button. It's that simple.

Orange Record: A name that appears in orange is already a registered voter in your county. The best method for adding these individuals is to Select the record (one mouse-click) > Right-click on it > Select merge pending record with voter record. Choose the new record, add any additional information and select merge. This will help to eliminate duplicates.

Voter Merge * TEST DATA *****

Voter one

Name Suffix: Private: ☐ Select this Voter Search ☒ US Citizen: ID: 133023

Last: Adams First: Sally Middle: J

Address: 495 Sunny Brook Dr Precinct: 15.1

City: Salina Zip: 84654-1432 Old ID:

Phone: 123-4567 Date of Birth: 9/15/1970 Birth Place:

SSN: 1234 Signature: DL #: 123456 DL State: Utah

Party: Unaffiliated How Registered: Unspecified Source: Driver's License Office

Disabled: ☐ Status: Active Reason:

Absentee: ☐ Registration Date: 9/5/2007 9/5/2007

Voter two

Name Suffix: Private: ☐ Select this Voter Search ☒ US Citizen: ID: 400874

Last: Adams First: Sally Middle: J

Address: 495 Sunny Brook Dr Precinct: 15.1

City: Salina Zip: 84654-1432 Old ID: 3911

Phone: (435) 123-4567 Date of Birth: 9/15/1970 Birth Place: UT

SSN: 000-00-1234 Signature: DL #: 123456 DL State: Utah

Party: Unaffiliated How Registered: By mail Source: By Mail

Disabled: ☐ Status: Active Reason:

Absentee: ☐ Registration Date: 10/8/2007 10/24/2004

Data Conversion: 5/18/2005

Buttons: Merge Not Duplicate Next Cancel

You could also just verify their address, import them into your county and then get rid of the duplicate in the voter search screen as well, but the previous method discussed saves you a couple of steps. If you choose to enter these people by hand in voter search screen, you can choose to delete the voters in the pending database, by right-clicking and selecting delete.



Confirmation Requests

Managing the confirmation process is incredibly easy and user-friendly. First, go to the Voter Search screen and search for the voter's name (Voters > Voters). When their record appears, you have two options. Both of which will take you to the same screen.

Option 1. Select the voter's record with one mouse click, right-click and select **inactivate** and send confirmation. This will take you to the confirmation tab/screen.

Name	Status	Address	City	County	Birth Date	Reg. Date
Adams, Roland Gordon	Inactive	110 S 200 E	Moab	Grand	11/26/1948	10/8/1997
Ahlstrom, Jared Merrill	Active	167 N 100 E	Moab	Grand	4/23/1978	2/26/2004
Alden, Travis Edward	Active	336 E Center St	Moab	Grand	2/26/1986	3/22/2004
Aleff, James J	Active	33 N Main St	Moab	Grand	12/1/1966	10/30/2000
Alexander, Mary Sandi			Moab	Grand	7/27/1943	10/23/2006
Alkadimi, Belal Bakir			Moab	Grand	2/9/1959	10/22/2003
Aloia, Franco J			Moab	Grand	7/29/1974	8/25/1998
Andersen, George J			Moab	Grand	1/1/1901	2/26/1992
Anderson, Christina Lynn			Moab	Grand	10/29/1957	10/24/2003
Anderson, Dorothy			Moab	Grand	1/1/1901	2/26/1992
Anderson, Kevin L			Moab	Grand	3/27/1959	5/20/1992

Total: 774
 of: 774

Confirmation Sent: ☐

Option 2. Go into their voter record (double-click) and select the confirmation tab.

After selecting the add confirmation button the following screen form will appear. The release date is set to the current date, but it can be changed to go out whenever you want. Once you have selected a release date, it will go out on the following Sunday. Next, select a reason as to why you are sending the confirmation. Finally, choose the address that you want to send it to. The residence address is set as the default, but you can send it to their mailing address or another address as well. Select Save. You now have a record of the confirmation that has just been sent.

Voter Information | Signature | Absentee Setup | **Confirmations**

Release to be printed date: 4/17/2008

Reason is required: Confirmation Notice Sent

Residence ☒ Mailing ☐ Other ☐

Address: 116 S 300 E

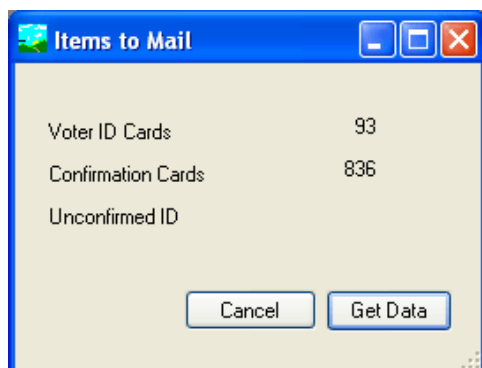
City: Moab State: UT Zip: 84532-2614

Remember! As soon as a confirmation request has been generated, the voter is made inactive. In addition, you can only delete the record before it has been sent.

Heads-up! Whenever a confirmation is sent, the voter is made inactive. If the confirmation request is returned, you will need to go into their record and select active from the status drop down box. While you are here, you will also want to select the confirmation tab and select the returned button and choose a reason as to why it was returned to you.

Viewing the Number of Sent Confirmation Requests and Voter ID Cards: If you are interested in seeing how many voter ID and confirmation request cards have gone out in a particular week or have gone out over a range of time, go to:

Utilities > Printing Utilities > Print Log.



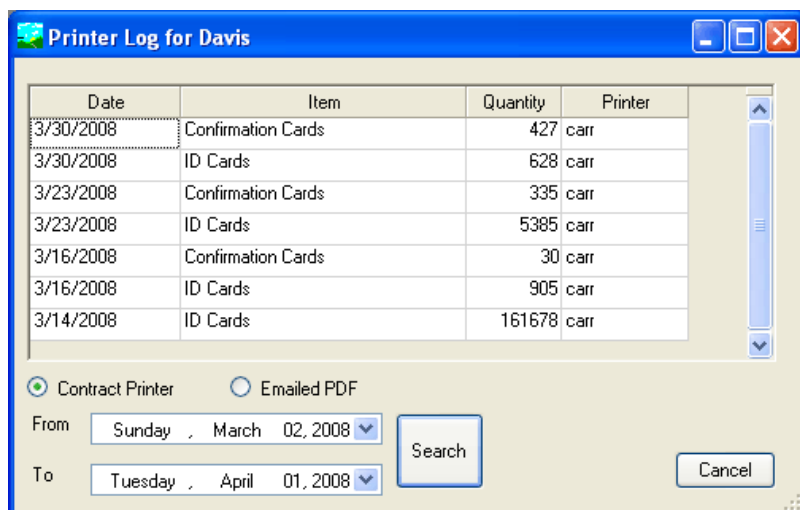
The 'Items to Mail' dialog box displays the following counts:

Voter ID Cards	93
Confirmation Cards	836
Unconfirmed ID	

Buttons: Cancel, Get Data

To see how many voter ID's and confirmation requests will be going out go to:

Utilities > Printing Utilities > Items to be mailed.



The 'Printer Log for Davis' dialog box displays a table of printer logs:

Date	Item	Quantity	Printer
3/30/2008	Confirmation Cards	427	carr
3/30/2008	ID Cards	628	carr
3/23/2008	Confirmation Cards	335	carr
3/23/2008	ID Cards	5385	carr
3/16/2008	Confirmation Cards	30	carr
3/16/2008	ID Cards	905	carr
3/14/2008	ID Cards	161678	carr

Options: ☒ Contract Printer, ☐ Emailed PDF

From: Sunday, March 02, 2008

To: Tuesday, April 01, 2008

Buttons: Search, Cancel

Elections

State wide and federal elections are created by the elections department of the Lieutenant Governor's Office. These elections are denoted by a green check mark. However, you are responsible for creating any local and municipal elections for your specific county. To make managing the election process as easy as possible, we have added an election checklist that will walk you through each step of the process that needs to be performed.

Each option is listed in the order that it should be followed. To the right of each step is a "Do it" button. Selecting this button will take you to appropriate screen. After accessing the screen that is tied to each step, the check box to the left will be marked with a red check. This doesn't necessarily mean that you have completed the task, so if you want to deselect the red check box and mark it yourself when it is done, feel free to do so. To access the election checklist go to *Elections > Election Checklist*.

Done	Description	
Annual Processes		
<input checked="" type="checkbox"/>	Clear Checklist	Do It
<input type="checkbox"/>	Run Annual Processing which removes absentee status, marks as inactive all voters who have not voted in the last two federal elections, marks them for a confirmation card, removes all who have been inactive for two federal elections.	Do It
<input type="checkbox"/>	Print labels for voters marked as permanent absentee to send them applications for absentee ballots for the year	Do It
<input type="checkbox"/>	Scan returned absentee applications and change items on the registration.	Do It
Election Processes		
<input type="checkbox"/>	Clear Election Process Checklist	Do It
<input type="checkbox"/>	Run pre-election processing which removes marks indicating that absentee ballots have been printed and voter is included on poll book.	Do It
<input type="checkbox"/>	Create election if it is not a state wide election.	Do It
Print Checklist		Cancel

Remember! Annual processing is conducted annually at the beginning of the year. The election process must be run before every election.

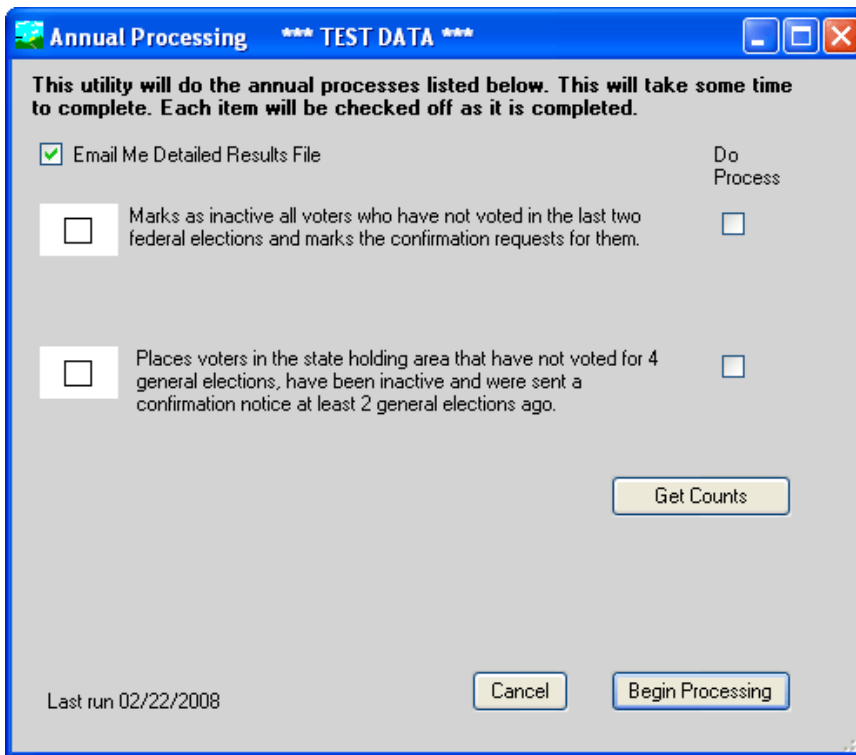
Annual and Election Processes

Before an election can be created, polling place established or absentee ballot issued, you must perform certain annual and election processes. Annual processing should be run once at the beginning of the year. Election processes should be run before every election.

Annual Processing: Think of annual process as a type of spring cleaning. It performs the following functions:

- A. It makes all voters inactive who have not voted in the last two federal elections and marks them to receive a confirmation request.
- B. It places voters in the state holding area that have not voted for four general elections, have been inactive and were also sent a confirmation request at least two general elections ago.

As for options A and B you can choose to run either by themselves or both together. However, it is recommended to run both options as they will ensure that your database is updated and inactive voters are removed and sent to the holding area. In addition, the "email me" detailed results file is selected to send you a listing of the results.



Remember! To see how many voters will be affected by annual processing, mark each checkbox and select the get counts button. To start the actual processing select the begin processing button. This must be run every year.

Viewing Results and Actual Processing: To get a glimpse of how many people will be affected by your changes, select the appropriate check box and the get counts button. To finish the annual processing, select the begin processing button. This will take a few minutes to process. When you are completed you will notice that the red check mark has been selected to the left of the “Run annual processing...” option on the election checklist.

The Holding Area: The Final Rest Stop

You might be asking yourself, “What if I want to bring that person back from the holding area?” Answer: Enter their name in the Voter Search screen and select the holding area search. Insert their address, verify it and save the record. They will then be placed in your county again.

Election Processing: Run Before Every Election

Select the Do-it button for the clear elections process checklist option for a clean palette. Then select the run pre-election processing option, which will remove all marks indicating that someone received and voted absentee in the last election. If this is not run, anyone who received a ballot in the last election will not receive one in the upcoming election if they requested to be an absentee voter. While this removes the mark that they received a ballot, it does not remove the mark that makes them an active absentee voter or “permanent” absentee voter. For information on how to setup and manage the absentee process, please see page 38.

That’s it! You’ve removed a majority of the barriers that will keep you from maintaining a clean database and managing a successful election. Moreover, you can now create an election.

Creating an Election

If you've gotten to this point, you should have completed the following steps:

1. Run the annual processing process.
2. Run the pre-election processing.

To create or view a previously held election, go to *Elections > Election Maintenance*. To view a previous election, select the election that you want. To create a new election, select the add election button. Once you have created your election you will then need to create an election plan.

Creating an Election Plan

A majority of how you manage an election is based on your election plan. This should be done as soon as you have or the State has created the election. To create a master election plan, go to *Precincting > Polling Places > Select Election Plan (upper left-hand corner)*. It will take you to the polling place address screen. This is also referred to as the election plan screen.

Early	Short	Polling Places
<input type="checkbox"/>	<input type="checkbox"/>	Absentee
<input type="checkbox"/>	<input type="checkbox"/>	Civic Center
<input type="checkbox"/>	<input type="checkbox"/>	EDC Building
<input type="checkbox"/>	<input type="checkbox"/>	First Baptist Church
<input type="checkbox"/>	<input type="checkbox"/>	Grand Center 10
<input type="checkbox"/>	<input type="checkbox"/>	Grand Center 3
<input type="checkbox"/>	<input type="checkbox"/>	Grand County Courthouse (Clerk Lobby)
<input type="checkbox"/>	<input type="checkbox"/>	Grand County Courthouse (Court Lobby)
<input type="checkbox"/>	<input type="checkbox"/>	New City Municipal Building

Remember! To create an election plan, select the election plan button in the upper left-hand corner of the polling place address screen. This will take you to the master election plan screen.

Polling Places: At the top of the screen is a listing of polling places. The bottom half of the screen will contain your election plans and the polling places assigned to their precincts.

If you have not created an election plan, you will notice that you have a listing of polling places under the normal polling place column. By normal, these are polling places that will typically be assigned to specific polling places. This column will rarely be changed and makes it easy to assign polling places to your election plan.

The master election plan screen allows you to set up election plans for up to three elections a year. Each column represents an election. For instance, in the example below we have election plans set up for the 2008 June Primary and the Western States Presidential Primary. You can select an election from the drop down box. As it relates to this screen, you have done what is required. Select the save button and proceed to the Polling Place screen. However, you have a couple more options that you can use to assist you in managing your polling place, polling officials and voting machines (DREs).

The screenshot shows the 'Master Election Plan' window with '*** TEST DATA ***' in the title bar. It features two dropdown menus at the top: 'Western States Presidential Primar' and 'Primary [06/24/2008]'. Below these are two tables. The first table lists positions (Poll Manager, Poll Book Clerk, Ballot Clerk) with columns for 'Number' and 'Additional' for each of the two elections. The second table lists DRE-related options (Initial DREs, Up to Voters, DRE for each additional Voters) with columns for 'Number' and 'Additional' for each election. At the bottom, there are buttons for 'Delete Position', 'Add Position', 'Print Position Plan', 'Spread to Polling Places' (with three checkboxes), 'Cancel', and 'Save'.

Position	Number	Additional	Number	Additional
Poll Manager	1	1,000	1	1,000
Poll Book Clerk			1	
Ballot Clerk			1	

	Number	Additional
Initial DREs	0	3
Up to Voters	0	500
DRE for each additional Voters	0	200

Remember! Unless an election plan is created, you cannot manage an election. This screen allows you to create up to 3 election plans a year. You can also use it to help you determine how many voting machines and election workers you will need if you choose.

Polling Officials: This option allows you to assign a minimum number of polling officials to this polling place. To add a position, such as a ballot clerk, poll book clerk or poll manager, select the add position button. Then use the drop down box to choose the position. For the primary in June (2nd column) I have requested 1 poll manager at a minimum to staff this polling place. I have also requested one additional poll manager for every additional 1,000 voters. In the example above I have also requested 1 ballot clerk and 1 poll book clerk.

To recap, insert the number of polling officials that you want for any position in the "number" field. If you want 5 poll book clerks, insert the number 5. You can stop here if you would like. However, if you want VISTA to calculate how many officials you will need based on the number of voters at your polling place, insert a number into the "additional" field. For instance, if you want 1 additional ballot clerk for every additional 500 people who will be voting at this polling place, insert the number "500" in the "additional field."

DREs: The same process used for polling officials is used for assigning and/or calculating the number of voting machines at each polling place. In the example that we have been using, you can see that I have requested 3 voting machines for up to 500 voters. For every additional 200 voters, 1 voting machine will also be assigned to this polling place.

If you have decided to use either the polling official or DRE options, you will have to select the check box of the election that you have set up and select the spread to polling places button. This will initiate the changes that you requested. To see your changes, go into one of your polling places. Polling places can be accessed by going back to the polling places screen and right-clicking on the polling place.

Remember, the two options that we just discussed are not required, but can be helpful in making the management of your polling places, polling officials and voting machines easier. Think of it as a guide or blue print to assist you as you are staffing your polling positions. It's up to you. Regardless, you are still going to have to set up your poll workers, as this has no effect on that process.

Election Plans: Assigning Polling Places

After creating your election plan, you will need to assign polling places to your precincts. This will complete your election plan. The number of election plans that you created in the master election screen will determine how many columns (i.e. elections) you will have at the bottom of the polling place screen. In the example below, we created an election plan for an election on February 2nd. By default, the normal polling places of your precincts is assigned to your election plan.

Polling Place Addresses * TEST DATA *****

Election Plan

Right click the Polling Place to see detail

Add

Alt A start Search.
Enter to Search.
Alt D to see Polling Place Detail

Alt A start Search.
Enter to Search.
Alt D to see Polling Place Detail

Alt P start Search.
Enter to Search

Copy Election Polling Place Plan

Saved Plans: 2007 November Election

Delete Plan

Election to Manage: Normal

Save Plan

Restore Plan

Normal Polling Place

Delete All Polling Places for Election

Polling Places
<input type="checkbox"/> Absentee
<input type="checkbox"/> Civic Center
<input type="checkbox"/> EOC Building
<input type="checkbox"/> First Baptist Church
<input type="checkbox"/> Grand Center 10
<input type="checkbox"/> Grand Center 3
<input type="checkbox"/> Grand County Courthouse (Clerk Lobby)
<input type="checkbox"/> Grand County Courthouse (Court Lobby)
<input type="checkbox"/> New City Municipal Building

Precinct	Normal Polling Place	02/05/2008
01:45	Grand County Courthouse (C	Grand County Courthouse (C
01:55	Grand County Courthouse (C	Grand County Courthouse (C
02:45	Spanish Valley Water Office	Spanish Valley Water Office
02:55	Spanish Valley Water Office	Spanish Valley Water Office
03:49	Grand Center 3	Grand Center 3
03:59	Grand Center 3	Grand Center 3
04:45	First Baptist Church	First Baptist Church
04:49	First Baptist Church	First Baptist Church
04:55	First Baptist Church	First Baptist Church
04:59	First Baptist Church	First Baptist Church
05:45	Civic Center	Civic Center
05:55	Civic Center	Civic Center
06:45	Absentee	Absentee

Print Polling Place Plan

Cancel

Remember! To change the polling places of an election you must first select the election from the drop down box.

Drag and Drop: After selecting the election you want, drag and drop the polling place to the precinct that you want.

First Things First: Choosing Your Election to Manage

Before making any changes to the polling places of your election plan, you will need to select the election/column that you want to modify from the election to manage dropdown box. You now have the green light to change the polling places of any of the precincts for that particular election.

Changing Your Polling Places: If you will not be using the normal polling place for a precinct, select the polling place from the top of the screen, drag and drop it onto polling place that is currently there. If you are making a number of changes and anticipate using this election plan in the future, you can save this plan. Select the save plan button, enter a name for it and select ok. You will then be able to assign this election plan to future elections by selecting it from the saved plans at the top of the page. To assign this election plan to another election you will first select the election from the drop down box and then select the plan from the saved plans drop down box. That's it.

Delete All Polling Places for an Election: If you want to start from scratch, select the election that you are working on from the election drop down box and select the delete all polling places button. You can then begin dragging and dropping the polling places on the specific precinct fields.

Normal Polling Place: The normal polling place column is a listing of polling places that are typically used in any given election. This is a screen that you won't want to change, unless you are actually making a change to the precinct on a more permanent basis. It's also important to note that if you are going to make a change to the normal polling column that you change the polling place on the precincts screen as well, as this is where the normal polling place is being pulled from.

Creating Your Sample Ballot

After the election has been created and you have created your election plan, you will need to create a sample ballot. Go to: Elections > Sample Ballot. The process of managing races, ballot initiatives and candidates is easy. All federal and state races will be entered by the elections office. However, you will be responsible for all county and municipal races and candidates for your specific county.

Adding a Race: To add a race, select the appropriate election and race designation (i.e. county, local school board, etc.) from the area drop down box. Then select the add race button.

The 'Races' window displays a table with the following data:

Race	District	Ballot	PDF	Vote For	Export ID
North Sanpete School Board District	N Sanpete School District 3	Non Partisan	<input type="checkbox"/>	1	200037
S Sanpete School Board District 2	S Sanpete School District 2	Non Partisan	<input type="checkbox"/>	1	200043
S Sanpete School District Bond	S Sanpete School Board Bond	Non Partisan	<input checked="" type="checkbox"/>	1	200044

Buttons: Add Race, Delete Race

Type in the name of the race, the district that will be voting in this race and the ballot style (if it applies). When it comes to including the district, the name of the district doesn't matter. What matters is what precincts are included in the district. For instance, if you had a county-wide election where everyone was voting on a local bond, you would want to choose a district that included all of your county's precincts, such as a county attorney, county clerk, etc. The name of the district does not have to match the name of the race. In other words, your county bond could have a district name of county clerk.

The 'Race' window contains the following fields and buttons:

- Election: Primary 06/24/2008
- Name: North Sanpete School District 5
- District: N Sanpete School District 5
- Party: Non Partisan
- Ballot: ☐ Has PDF Document
- Vote For: 1
- Buttons: Upload Doc, Delete Doc, View Doc, Delete Race, Cancel, Save

Remember! When choosing a district for your race, the name of the race does not have to match the name of the district. What is important is that the district that you select contains all of the precincts that will be voting for a candidate or ballot item.

Adding Candidates: Select (one mouse click) the race that you want from the races section and then select the add candidate button. A new row will then be added. Insert their name, choose their party and choose whether or not they are an incumbent. To upload a candidates "about me" pdf, select their row and then select the upload pdf button. Select "browse" and select the \$C directory. All pdf's must be uploaded from your C: drive. However, when uploading them VISTA, your C: will look like \$C.

The 'Candidates' window displays a table with the following data:

First	Middle	Last	Suffix	PDF	Party	Incumbent	Export ID
Dale		Barker		<input type="checkbox"/> Unaffiliated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	20003701
Rich		Brotherson		<input type="checkbox"/> Unaffiliated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20003702
Roy	M.	Ellefsen		<input type="checkbox"/> Unaffiliated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20003703

Buttons: Add Candidate, Delete Candidate, Upload PDF, Delete PDF, ViewPDF, Cancel

Printing Your Official Register

Once you have your election set up and you are ready to print your official registers, go to:

Reports > Election (which is the default) > Select the Official Register radio button in the left-hand column.

As you can see, the election tab is the default and the official register radio button is selected for you. The most recent election will appear in the election drop down box. Make a selection from the drop down box if the election you want is not showing. Then select the polling places that you want to print your poll books/official registers for using the check boxes or the all button. To view the official register before printing it, select the view button located in the lower right-hand corner of the form. You will also note that the “view” radio button is also selected in the output options box in the lower left-hand corner of the form.

The screenshot shows the 'Selection Options' window. On the left, under the 'Election' tab, the 'Official Register' radio button is selected. Other options include 'Posting List', 'Amended Official Register', 'Amended Posting List', 'Blank Official Register', 'Provisional by Polling Place', 'Provisional Ballot List', and 'Provisional Ballot Summary'. On the right, the 'Election' dropdown menu is set to 'Primary[05/13/2008]'. Below that, the 'Polling Places' section lists several locations with checkboxes: 'Absentee', 'Civic Center' (checked), 'EOC Building' (checked), 'First Baptist Church' (checked), 'Grand Center 10' (checked), 'Grand Center 3', 'Grand County Courthouse (Clerk Lobby)', and 'Grand County Courthouse (Court Lobby)'.

Output Options

When you have made all of your selections and you are ready to print your register, select the “order emailed pdf” radio button. This option will ensure that your request will not weigh down the server and/or slow VISTA down for its other users throughout the state. Making this selection is critical, particularly the closer you get to an election. Finally, select a password that you will use to unzip the file that is sent to you. That’s it.

Selecting the “order ftp pdf” option will give you the option to send it to your pdf folder at the state or to one of your choosing. The official register for each polling place will be a pdf file.

The screenshot shows the 'Output Options' window. It contains several radio buttons: 'Print', 'View', 'Emailed PDF File', 'Emailed Excel File', 'Order Emailed PDF' (which is selected), and 'Order FTP PDF'.

Elections: Recording Voting History

The process of recording voter history is extremely efficient as it allows you to record voting history while capturing voter signatures. To start, make sure that your hand-scanner is plugged in and then go to *Elections > Voting History*. When choosing the election and polling place, you have two options. You can either scan the barcode on the front of your official register, which will populate these fields for you or you can manually choose them from the drop down box yourself.

The screenshot shows the 'Voting History' application window with the title bar 'Voting History *** TEST DATA ***'. The interface includes several fields and controls:

- Election:** A dropdown menu showing '2007 November Election[11/06/2007]'.
- Polling Place:** A dropdown menu showing 'Grand County Courthouse (Court Lobby)'.
- Type:** A dropdown menu showing 'Normal'.
- Total Votes:** A text field showing '2'.
- Absentee or By Mail:** A text field showing '0'.
- Duplicates:** A text field showing '0'.
- New Signatures:** A dropdown menu showing 'New Signatures'.
- Rotate 180:** A checked checkbox.
- ID:** A text field showing '7894561' with an 'Enter' button next to it.
- Signature on File:** A text field showing 'Voter Registration'.
- Voter Registration:** A text field showing '03/04/2008'.
- Scanned Signature:** A large area displaying a scanned signature image.
- Sound:** A dropdown menu showing 'Bling.WAV'.
- Buttons:** 'Lookup', 'Open', 'Delete', 'Delete Signature', 'Keep', and 'Cancel'.

Below the 'Election' and 'Polling Place' fields, there is a table with two columns: 'Name' and 'ID'.

Name	ID
Ahlstray, Jared	1234567
Adams, Ron A	7654321

Other designations that you will want to make include choosing the type (early or normal), selecting the rotate 180 check box to ensure that the scanned signature appears right-side up and whether or not you want to view the scanned images. You can choose to only see new signatures, all signatures or none of them at all. The default is set to "New Signatures". You're now ready to start scanning the bar codes in the official register and recording voter history.

Heads-up! While you can scan someone's barcode as many times as you want, it will only record their voting history once. The question might be asked, why would I want to scan the barcode more than once? If you don't like the signature, you can continue scanning until the quality meets your expectations. To delete a signature, select the delete button. To keep it, select the keep button.

Recording Voter History by Hand: If your scanner should cease to operate, you can always type in the voter's voter id number to record history. The obvious downside to this is that it will take significantly longer and you won't be able to record their signature. Simply insert their voter id number in the corresponding field and select the enter button.

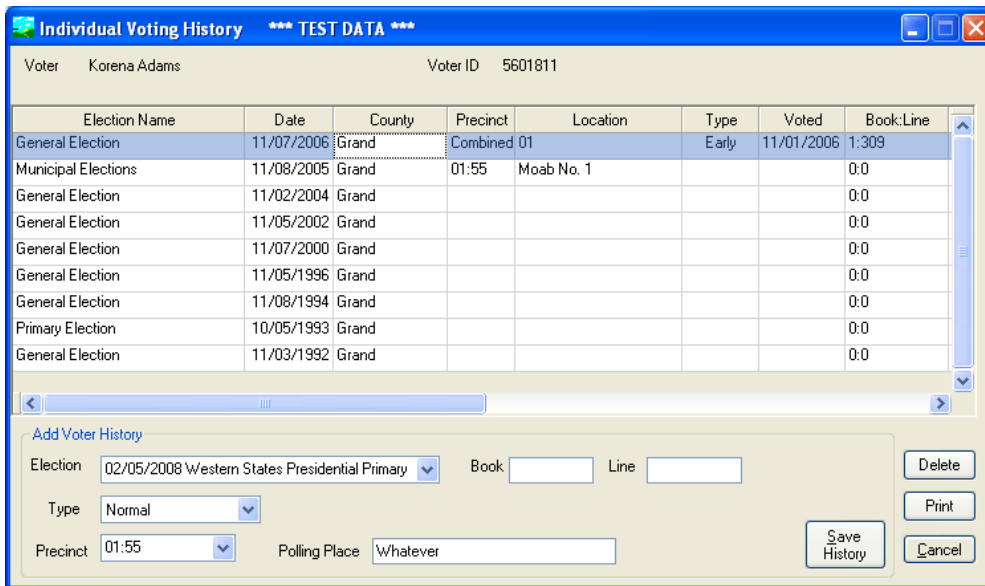
Voter Details: To view a voter's record, select their entry and select open. To search for a voter, select the lookup button. To delete an entry, select it and then the delete button.

Heads-up! One thing to remember is that whenever you close the voter history screen, the table will be cleared. Don't worry, you haven't lost any information. It just refreshes itself each time you access the screen, so make a note of where you left off in your official register.

Recording Voter History: Using the Voter Search Screen

While it is recommended that you use the Voter History screen to record voter history, there is also another option that you should know about. Go to *Voters > Voters > Search on the Voter > Go into their record > History > Voting*. Here you can manually add voter history for any normal, absentee, early, and provisional voter. By default, the most recent election, “normal” history type and precinct are populated. If this is what you want, select the save history button. If you want to change the type to early voting, select “early” from the type drop down box and then enter the book and line number. For the most part, they only thing that you will change will be the voting type.

To delete a voting history record, select the record and then press the delete button.



Individual Voting History * TEST DATA *****

Voter: Korena Adams Voter ID: 5601811

Election Name	Date	County	Precinct	Location	Type	Voted	Book:Line
General Election	11/07/2006	Grand	Combined 01		Early	11/01/2006	1:309
Municipal Elections	11/08/2005	Grand	01:55	Moab No. 1			0:0
General Election	11/02/2004	Grand					0:0
General Election	11/05/2002	Grand					0:0
General Election	11/07/2000	Grand					0:0
General Election	11/05/1996	Grand					0:0
General Election	11/08/1994	Grand					0:0
Primary Election	10/05/1993	Grand					0:0
General Election	11/03/1992	Grand					0:0

Add Voter History

Election: 02/05/2008 Western States Presidential Primary Book: Line:

Type: Normal

Precinct: 01:55 Polling Place: Whatever

Petitions

To add, delete and manage existing petitions go to *Elections > Petitions*.

Adding a Petition: Select the add petition button. Type in the name of the petition, the date that it is due and the number of votes needed. Select save. Once you have started adding signatures to your packets you can come to this screen to get an overall view of the petition.

Editing Petition * TEST DATA *****

Petition Name: Number Needed:

☐ By Senate District ☒ By County Date Due: 26 May 2008

Current Statewide Petition Statistics

Un Readable	Not Registered	Bad Address	Not Matching	Other	Duplicates	Valid

Buttons: Delete Petition, Cancel, Save

Adding a Packet: Insert the number of the packet in the packet number field and select the add packet button. You will then be viewing the inside of the packet where you will record and verify the signatures of the packet.

Petitions * TEST DATA *****

Name	Number Needed	Date Due	State Petition
TAB	1000	05/26/2008	<input type="checkbox"/>
County Council District 5	25	03/17/2008	<input type="checkbox"/>
County Council At Large	100	03/17/2008	<input type="checkbox"/>
County Council District 4	25	03/17/2008	<input type="checkbox"/>
County Council District 2	25	03/17/2008	<input type="checkbox"/>
Libertarian Party (2008)	2000	02/15/2008	<input checked="" type="checkbox"/>
Personal Choice Party (2008)	2000	02/15/2008	<input checked="" type="checkbox"/>

Add Petition

Packet Maintenance

Packet Number: Add Packet

☒ Selected Dates

Packets For Selected Dates

From: 4/ 3/2008 To: 4/ 3/2008 Go

Delete Empty Packet

Regular: 1

Cancel

Verifying signatures: Insert the name of the person who collected the signatures in the collector field. The entry date and date that you are verifying the signatures is set to the current date. To verify a voter you must first search on that voter. Insert their first and last name and any other identifying information that you might need into the appropriate fields and then select the find button. If they are a registered voter, their name will appear in the table below. When you have found the person that you are looking for, you will need to make a designation.

Valid Voters: If someone is a valid voter, you can double-click on their name and it will then appear in the packet signatures table to the right. You can also select the valid button.

All Other Voters: If you have conducted a search and the voter cannot be validated, select the appropriate button above. This will include the person's name in the signature table, along with the reason that it wasn't validated.

Duplicates: Let's say someone has signed three different packets. You have validated the first packet and are now doing another search on this person. Their name appears in the search of another packet and you double-click on their name to validate it. Since they have already been added to petition, this entry will be listed as a duplicate. It doesn't matter how many packets someone signs, the first validated signature will be counted and all others will be listed as duplicates.

Designations

Deleting a Signature: Simply select the voter from the packet signature table and select the delete button.

Verifying the Packet: When you have verified a packet select the "Verified" check box in the packet.

Printing the Packet: If you ever want to print off a listing of the packet, select the print packet button.

Adding a Page: To add pages to a packet enter the page number in the page field and select the "+" sign.

No signatures: If a packet doesn't have any signatures, select the "No Signatures" button.

Editing a Registrant: If you want to edit a registrant's/voters record, select it (one click) and then select the "Edit Registrant" below.

Polling Officials/Election Workers

To add and manage your election workers (aka poll workers) for any election, go to *Elections > Election Workers*. This will take you to the election worker search screen. To identify potential poll workers, simply use any of the search fields to make it as narrow or broad as you would like. For instance, when looking for a pool of candidates to choose from you could conduct a search based on a specific precinct, people that will be voting at a particular polling place and/or those that have previous poll worker experience. Again, any of the fields can be used to conduct a search.

Name	City	Phone	DOB	Party	Precinct	Polling Place
Adams, Roland	Moab	(435)259-1234	11/26/1948	Unaffiliated	01:45	Grand County Courthouse (
Ahlstrom, Jared	Moab	(435)259-6321	04/23/1978	Unaffiliated	01:45	Grand County Courthouse (
Alden, Travis	Moab	(435)259-9632	02/26/1986	Unaffiliated	01:45	Grand County Courthouse (
Aleff, James	Moab	(435)259-9635	12/01/1966	Unaffiliated	01:45	Grand County Courthouse (
Alexander, Mary	Moab	(435)259-7412	07/27/1943	Democrat	01:45	Grand County Courthouse (

Adding Poll Workers to a Polling Place: After identifying a voter, double-click on their name to access their election worker record and give them an assignment. To make an assignment, go to assignment details at the bottom of the page and enter the election that they will be working on, the position that they will be holding and polling place that they will be working at. Finally, select the add button. This will add this record to the table above. To delete a record, select it (one mouse-click) and select the delete button.

In the example below, Mr. Adams will be working the Western States Primary as a poll book clerk at the Grand County Courthouse. As long as this record is selected, you can make changes to it.

Election	Polling Place	Position	County	Score	Canceled
02/05/2008 - Western States Pre	Grand County Courthouse (Court Lobby Poll Book Clerk)	Grand	9		<input type="checkbox"/>

Category	Score
Election	50.00
Training	25.00
Travel	25.00
Misc	0.00
Total	100.00

Tracking Spending: To enter the amounts of what you will be paying a poll worker, place your cursor in the corresponding field and insert the amount. The total will be calculated for you. Make sure to select the save button at the bottom of the page. This will allow you to generate payment reports in the reports section of VISTA.

Additional Details

As you can see, there are a number of additional fields that you can use to manage the information of a particular poll worker. Keep in mind that if you make changes to the election worker section at the top of the page that you will need to select the save button at the top of the page. To save changes to the assignment details section at the bottom of the page, select the save button at the bottom of the page. For instance, if a poll worker cannot work an election, you will want to select the cancel button and select the reason why from the corresponding dropdown box.

Keeping Notes: To keep notes on poll worker, first select the date button, type the message under the date that has just been inserted for you and select the save button.

Viewing a Poll Workers Registration Record: If you want to view their registration record, select the voter button.

Preferred Position: As the title suggest, you can choose what position they prefer to hold.

Go to Polling Place: This will provide a detailed listing of the polling place.

The Five Tabs: Managing Election Worker Information

Assignments: This is the default screen that appears when you initially enter the election worker record. This is where you give them an assignment and track their expenses.

Positions: As you might recall, when you create an election plan you have the option of entering how many of each position you would like at a polling place. If you used this option you would see the position title and number of people needed for a specific polling place. If you didn't, you won't see this information. Again, this option is provided to serve as a guide for you, but it isn't required.

The screenshot displays the 'Positions' tab in the VISTA software. At the top, there are tabs for 'Assignment', 'Positions', 'Training', 'Mailings', and 'Call Log'. Below these, there are two dropdown menus: 'Western States Presidential Primary[02/05/2008]' and 'Grand County Courthouse (Court Lobby)'. To the right of these is a 'Show' button. Further right are 'Date' and 'Save Note' buttons. Below the dropdowns, there are two tables. The first table has columns 'Position', 'Need', and 'Filled'. It shows one row for 'Poll Book Clerk' with 'Need' as an empty field and 'Filled' as '1'. The second table has columns 'Name', 'Position', 'Phone', and 'Party'. It shows one row for 'Adams, Roland Gordon' with 'Position' as 'Poll Book Clerk', 'Phone' as '(435)259-1234', and 'Party' as 'Unaffiliated'. At the bottom of the interface are buttons for 'Print', 'Print Mailing Label', and 'Cancel'.

Position	Need	Filled
Poll Book Clerk		1

Name	Position	Phone	Party
Adams, Roland Gordon	Poll Book Clerk	(435)259-1234	Unaffiliated

By using the dropdown boxes you can see who you have assigned to an election by polling place. Select the criteria and select the show button. You can also repeat the same steps for taking notes on this screen/tab that you did on the assignment screen/tab

Training: To track the training that a poll worker has received, select this tab. Make the desired selections and select the new button to insert the record into their history. To delete an entry, select the record and select the delete record. To make a change to it, select the record, make the change(s) and then select the save button. When creating an entry you can choose all or some of the fields. The choice is yours.

Type	Course	Date	Score
Beginning	Poll Training Management	4/8/2008	0

Training Details

Type: Beginning Date: 4/8/2008

Course: Poll Training Management

Score: 0

Buttons: Delete, New, Save

Window Buttons: Print, Print Mailing Label, Cancel

Mailings: This is great tool for tracking the mailings that have been sent to a poll worker. You can enter them manually here or go to “mail to election workers” on the election workers search screen. The latter method is highly recommended. We will talk about this in a bit.

To manually insert an entry, select the add mailing button and then insert the desired information by placing your cursor in the text fields of the entry. To delete the entry, select it and select the delete mailing button.

Date	Mailing Name	Election	By
04/08/2008	Training Follow-up	Aaron McElwee	02/05/2008

Western States Presidential Primary(02/05/2008)

Buttons: Add Mailing, Delete Mailing

Window Buttons: Print, Print Mailing Label, Cancel

Call Log: Perform the same steps that you would when adding and deleting an entry in the mailings and training tabs.

Date/Time	Reason	Result	By
4/8/2008 10:57:15 AM	Clarify phone number	Successful	Aaron McElwee

Buttons: Delete Call, Add Call

Window Buttons: Print, Print Mailing Label, Cancel

Mail to Election Workers

This is the best method for printing and mailing letters to your poll workers, particularly on a large scale. This screen is accessed by selecting the “mail to election workers” button at the top of the election worker search screen. The selected default is the assignment form letter. However, if you ever want to print the addresses of your poll workers, you would select the addresses radio button, located below the assignment form letter radio button.

Sending Out a Mailing to Your Poll Workers: Sending out a mailing is as easy as selecting the appropriate election, polling places to include in your mailing and the positions of the poll workers. After making these selections, you will want to select the name of the assignment letter that you want to use.

Creating and Selecting Your Assignment Form Letter: If you have not used this option before you will have to create a name for your assignment letter. When adding or selecting a mailing, you will be working in the “named letters” section of the form. To add a letter name, insert your cursor into the named letters drop down box and enter a name. In the example below, I have inserted the name “Poll Training 1”.

Will These Mailings Be Reflected in Their Record? Yes. If you were to review a poll workers record and select the mailings tab, you will see an entry for this mailing. Once a form name has been entered you can always select it from the same drop down box for future mailings.

The screenshot shows a web form titled "Mail to Election Workers". At the top, there is a dropdown menu for "Election" with the selected value "Western States Presidential Primary[02/05/...]". Below this are two main sections: "Polling Places" and "Positions".

The "Polling Places" section contains a list of locations, each with a checked checkbox: Absentee, Civic Center, EOC Building, First Baptist Church, Grand Center 10, Grand Center 3, Grand County Courthouse (Clerk Lobby), Grand County Courthouse (Court Lobby), New City Municipal Building, Spanish Valley Water Office, and Unassigned Poll Address. There are "None" and "All" buttons below the list.

The "Positions" section contains a list of roles, each with a checked checkbox: Alternate, Available, Ballot Clerk, Information Clerk, Poll Book Clerk, Poll Manager (highlighted), and Provisional Clerk. There are "None" and "All" buttons below the list.

Below these sections is a "Named Letters" section with a dropdown menu showing "Poll Training 1". At the bottom, there is a "Support Phone" section with a text input field.

Polling Official Reports: For a comprehensive listing of reports that will make managing the poll worker process and method of paying your poll workers easier, please go to Reports > Officials Tab.

Managing the Absentee Ballot Process

Step 1. Printing Absentee Applications

Go to Reports > Absentee > Labels for Absentee Applications.

In VISTA, the definition of a permanent absentee voter is anyone who has the “permanent absentee” check box selected. This check box is located under the absentee tab of the voter’s record. This doesn’t mean that the voter will receive an absentee ballot. It simply means that they will get an application on an annual basis to become an absentee voter for that year.

Step 2. Scan Returned Absentee Applications

Go to *Elections > Absentee Ballots > Scan Returned Absentee Applications*

When returning the absentee applications, you will have to select the add button to insert a date range/absentee record. This date range determines how long a person will be considered an absentee voter. Unless they are receiving a federal postcard, the default is the date that you returned the application through the end of the year. However, the range can be customised to whatever you want. Finally select the save button.

The voter will now be considered an absentee voter for whatever period of time you designated.

Remember! An absentee record can be created by returning an absentee application and adding the request or by going into the voter’s record, selecting the absentee tab and adding the record.

If an election occurs between a voter’s absentee date range, they will receive an absentee ballot.

Step 3. Printing Absentee Ballots

Go to Reports > Absentee > Labels for Absentee Ballots.

When a label is printed, that person will be marked as having received an absentee ballot. In addition, the date that the labels were printed is used for the date that it was mailed. Once a absentee label has been printed, you won’t be able to print another one for them until you delete their history record stating that one was sent to them. This is done by going into their absentee voting history.

Now that you have your absentee labels, you have two options.

Option 1: Put the labels on, send them out and proceed to step 5. In this option, you are not worried about tracking ballot numbers.

Option 2: Proceed to step 4 and insert the ballot number that each voter is receiving.

Step 4. Scan and Enter Absentee and By-Mail Ballots

Go to *Elections > Absentee Ballots > Enter Absentee Ballot Number*

Recording the ballot number associated with each voter is relatively easy. Simply scan the absentee label, hand-enter the ballot number in the ballot # field and select save. To record additional ballot numbers, just scan each barcode and save after every scan.

If you are not using a scanner, hand-enter the voter id number, insert the ballot number and select the save button. Whether you are using the scanning or hand-entering method, you only have to insert the ballot number by hand once and VISTA will then issue the next number in that sequence. Keep in mind that if you close this screen that you will have to remember where you left off and insert that number to start recording ballot numbers again.

Step 5. Scan Returned Absentee Ballots

Go to *Elections > Absentee Ballots > Scan Returned Absentee Ballots*.

This is the last step in the process. To make the process of recording absentee votes easier, it is recommended that you break the ballots up into three categories: counted; not counted; undeliverable. The designation of the category must be selected before you record the ballot. After selecting the check box for “counted”, start scanning the ballots that fall within this category. Then select the “not counted” check box and proceed as previously mentioned. While you are not required to break the ballots out by category it is faster.

Various Absentee Reports (Reports > Absentee Tab)

The following absentee reports will help you manage and track your absentee voters:

Absentee Ballot Status: Total ballots sent out and returned by precinct.

Absentee List: Provides a listing of your permanent absentee voters (those receiving absentee applications)

Absentee Ballots Sent and Returned: Sent and returned by county

Voters Receiving Absentee Ballots: Includes the names of voters receiving absentee ballots, dates sent, dates returned, type (absentee, by-mail), and precinct.

Ballots Sent By Date: Find how many ballots have been sent out by a specific date range

Applications and Actives By Precinct: Overview of applications and actives by precinct

Absentee Ballots to Send By Precinct: See the report title

Disposition of Absentee Ballots: Includes the overall total, number sent and returned by absentee category.

Returned Absentee Ballots * TEST DATA *****

Select Process and Not Counted Reason BEFORE scan

☒ Ballot Counted
 ☐ Undeliverable
 ☐ Not Counted

Scan the return address label bar code to mark all ballots for the voter in this election as returned and create voting history record. You may hand enter the voter id if the bar code is not

Election: Western States Presidential Primary (2/5/2008)

 Voter ID: Hand Enter

Double click to scan signature

Returned: Thursday, April 17, 2008

 Voter Entered:

Undo Cancel

Absentee Ballot Management: Reprinting Labels and Changing Mailed-On Dates

Go to *Elections > Absentee Ballots > Absentee Ballot Management*

This form provides two options. You can either change the mail-on date and/or re-print your absentee ballot labels.

Changing the Date: As you might recall, when labels are printed that is the date that VISTA records that they were sent. If you want the date to be something different, simply select the checkbox of the appropriate date and select the “change date sent to today”. It will then insert today’s date.

Reprinting Labels: If for some reason something happens to your printer while printing labels and the job is interrupted, you will have to come to this screen, select the date of the job that you were printing and select the delete button. If you don’t do this, you won’t be able to print the labels again, as VISTA thinks that the person has already received an absentee voter ballot. In short, this process clears the palette and allows you to print that job again.

Absentee Ballot Management * TEST DATA *****

Election: Western States Presidential Primary[02/05/2008]

<input type="checkbox"/>	02/12/2008 (1)
<input type="checkbox"/>	02/11/2008 (1)
<input type="checkbox"/>	02/06/2008 (2)
<input type="checkbox"/>	02/05/2008 (5)
<input type="checkbox"/>	01/28/2008 (2)
<input type="checkbox"/>	01/25/2008 (1)
<input type="checkbox"/>	01/23/2008 (1)
<input type="checkbox"/>	01/22/2008 (5)
<input type="checkbox"/>	01/18/2008 (1)
<input type="checkbox"/>	01/17/2008 (148)

You may delete absentee ballot records as a batch if your printing of the labels did not work. This will allow re-printing of the labels

You may also change the date recorded as sent. Do this if you are holding absentee ballots to be sent together

Change Date Sent to Today

Delete

Cancel

What If I Only Want to Reprint A Few Labels? If the batch of labels that you need to print is large, selecting the batch/order check box and selecting the delete button is the best option in most cases. However, say that you only want to reprint a few labels. Instead of deleting the entire batch, the best method will be to conduct a search for the voter, go into their record, select history (at the top of the page), select absentee. On the form that opens, select the ballot that you want to delete and then select the delete ballot information button at the bottom of the page.

Managing an Absentee Voter From Their Voter Record

If you want to make someone an absentee voter, you can go into their record via the voter search screen and select the absentee tab. As mentioned earlier, a voter is an absentee voter if they have a date range entered. To add a date range, select the add the button and enter the desired information. The default range is today's date through the end of the year. This can be modified to your specifications.

Voter Information | Signature | **Absentee Setup** | Confirmations

☒ Permanent Absentee Terminate ALL Orders

Beginning	Ending	Address	FPCA

Order Detail
Address use, first Absentee then mailing address and last residence address.

Address: 123 Ute Drive City: Salt Lake City Phone: FPCA ☐
 State: UT Zip: 84114 Fax: Military ☐
 International ☐

Party: Beginning: 4/17/2008 Ending: 12/31/2008 Delete Cancel Save

Delete Cancel Save Save/Exit

Managing Over The Counter Ballots and Early Voters

If a voter requests an over-the-counter absentee ballot, go to the voter search screen to locate the voter. After identifying the voter, select the voter (one mouse click) and then right-click on their record. You will see a number of options. Choose “early/absentee voting” to issue a ballot and record early voting history.

Heads-up! Before you can issue an OTC ballot, you will need to assign a ballot style to each precinct. This is done in the precincting section.

Name	Status	Address	City	County	Birth Date	Reg. Date
Adams, Roland Gordon	Inactive	110 S 200 E	Moab	Grand	11/26/1948	10/8/1997
Ahlstrom, Jared Merrill	Active	167 N 100 E	Moab	Grand	4/23/1978	2/26/2004
Alden, Travis Edward	Active	336 E Center St	Moab	Grand	2/26/1986	3/22/2004
Aleff, James J			Moab	Grand	12/1/1966	10/30/2000
Alexander, Mary Sandra			Moab	Grand	7/27/1943	10/23/2006
Alkadiami, Belal Bakir			Moab	Grand	2/9/1959	10/22/2003
Aloia, Franco J			Moab	Grand	7/29/1974	8/25/1998
Andersen, George J			Moab	Grand	1/1/1901	2/26/1992
Anderson, Christina Lynn			Moab	Grand	10/29/1957	10/24/2003

Total: 774
774

Confirmation Sent: ☐ Clear Search fields Add Search Cancel

Over-The Counter Ballot: If you are issuing an OTC ballot, select the absentee vote check box, enter the ballot number and select the save button. To spoil the ballot, select the spoil check box on the same screen and select save. If you are going to reissue another ballot, select the absentee check box again and enter the new ballot number.

Returning The Ballot: You have two options to return the OTC ballot. The first is probably the easiest as it saves a couple of steps. When issuing the ballot, select the return check box at the same time to perform both operations at once. Don't forget to select save.

The second option allows you to return the ballot from the voter search screen. Select the person's record and then right-click on it. Choose the “ballot returned” and select the election. That's it.

Absentee/Early Voting * TEST DATA *****

Absentee/Early Voting for Aleff, James J. Please select Election

Election: 02/05/2008 Western States Presidential Pri Precinct: 01:45

Absentee Voting

Absentee Vote: ☒ Return: ☐ Ballot #: 32 Ballot Style: 1

Ballot(s) issued

Election	Ballot #	Date Issued	Date Returned	Spoiled

Early Voting

Early Vote: ☐

Voting History for this Election

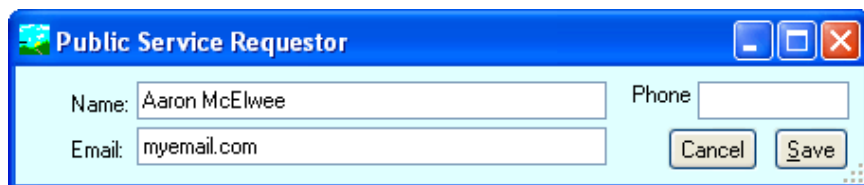
Save Cancel

Recording Early Voting History

You will perform the same steps used to issue an OTC ballot. The difference is that you will select the early vote check box instead of absentee vote. If the signature book and line number that they signed when voting is incorrect, simply insert the correct information. That's it.

Early Voting		
Early Vote:	<input checked="" type="checkbox"/>	Signature Book: <input type="text" value="1"/> Signature Line: <input type="text" value="1"/>
Voting History for this Election		

Public Service Requests

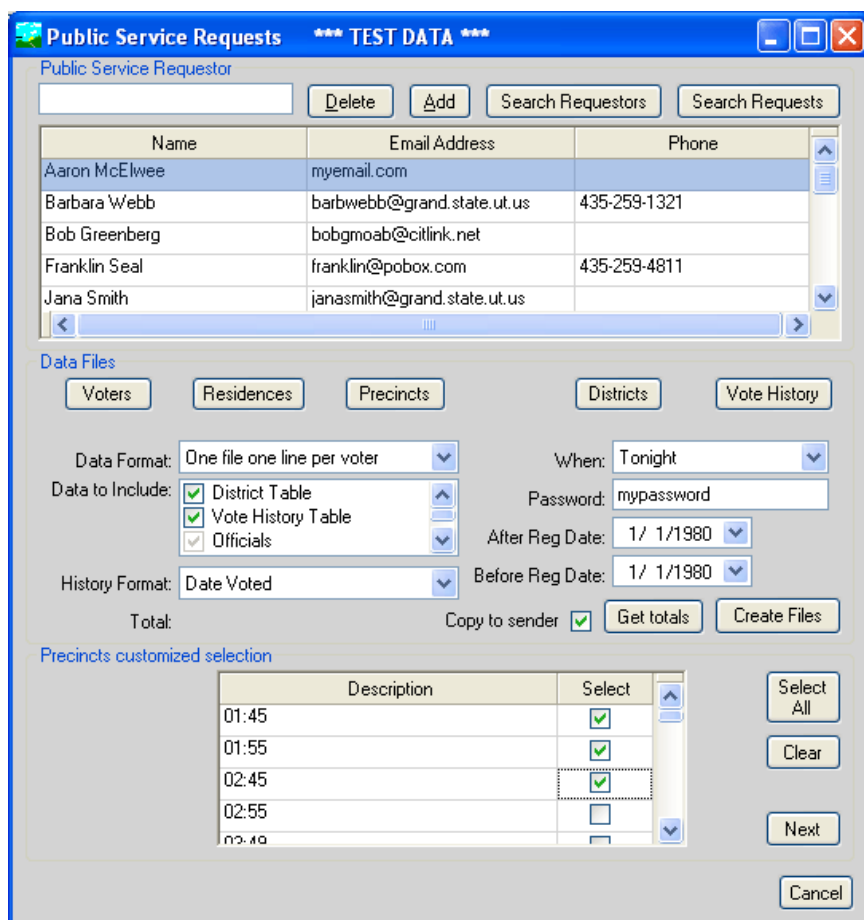


A small dialog box titled "Public Service Requestor". It contains two text input fields: "Name" with the value "Aaron McElwee" and "Phone" which is empty. Below the Name field is an "Email" field with the value "myemail.com". At the bottom right are two buttons: "Cancel" and "Save".

Adding a Requestor: If you have not created a request for this person before you will need to add a record for the requestor. This will allow you to create a history and track requests for this person. To do this, select the add button at the top of the page and insert the name and email address of the person. To refresh the list, select the “search requestors” button. You will then see the person that you just added.

Creating the Request: After you have added the requestor, you will need to tie the PSR (Public Service Request) to the requestor. To do this, simply select the requestor above (one mouse-click) and then make the necessary selections from the data files below.

Customising Your Request: If you want every piece of information on a voter you won't have to make any selections from the five data files. The five data files include: Voters, Residences, Precincts, Districts, and Vote History. To customise your public service request, you will be making selections from the five data fields. To access those options, select the appropriate data file field (i.e. Voters, etc.). Use the check boxes to make the selections and select the next button.



The main window of the "Public Service Requests" application. At the top, it says "Public Service Requestor" and "*** TEST DATA ***". Below this is a table of requestors with columns "Name", "Email Address", and "Phone". The table contains five rows: Aaron McElwee, Barbara Webb, Bob Greenberg, Franklin Seal, and Jana Smith. Above the table are buttons for "Delete", "Add", "Search Requestors", and "Search Requests". Below the table are "Data Files" buttons: "Voters", "Residences", "Precincts", "Districts", and "Vote History". Under "Data Files" are several settings: "Data Format" (One file one line per voter), "When" (Tonight), "Data to Include" (District Table, Vote History Table, Officials), "History Format" (Date Voted), "After Reg Date" (1/ 1/1980), "Before Reg Date" (1/ 1/1980), "Password" (mypassword), "Total", "Copy to sender" (checked), "Get totals", and "Create Files". At the bottom, there is a "Precincts customized selection" table with columns "Description" and "Select". The table contains five rows: 01:45, 01:55, 02:45, 02:55, and 03:45. The "Select" column has checkboxes, with the first three checked. To the right of this table are buttons: "Select All", "Clear", "Next", and "Cancel".

Remember! Before you start making any designations to your Public Service Request (PSR), first select the requestors name from the table at the top.

For example, if you wanted a listing of all active voters who lived in Castle Valley and lived within a particular precinct, you would choose those options.

Vote History: You will use this data field to limit the number of people who are included in your PSR based on the elections that they voted in. For instance, if you only want to include people who voted in the General Primary 2008, simply select the check box for that election. If you want people who voted in both the General Primary 2008 and Primary 2008 you will select both of these elections and the “and” radio button. Voters who did not vote in both of these elections will not be included. If you want to include voters who voted in either the General Primary 2008 or Primary 2008, select these elections and the “or” button. Voters who voted in either the General or the primary will be included.

Generating the PSR: After making your data file selections, you will then need to select some other options that will determine how the information is organized and presented. To see how much the PSR will cost, select the get totals button. To generate the actual PSR, you will need to select the create files button. However, there are a few more things that will need to do and know before generating and sending out the PSR.

Remember! To get a total of voters included in your PSR and find out how much it will cost, select the get totals button after making all of your selections.

To generate the actual PSR, select the create files button.

Data Format

One file, one line per voter: This format is set as the default, saves the most space and is typically the format preferred format. Each voter will appear on one line, along with all of their voting history information in a text formatted file that can be imported into Excel.

One file, multiple lines per voter: If a voter has voted in 5 elections, their name will appear on five separate lines, along with the corresponding election information in a text formatted file that can be imported into Excel.

Separate data files: If the requestor is importing this information into a database this is probably the best option.

Data To Include: With the exception of the age field, the following fields are selected as the default. If you only want to include certain districts, deselect the districts table and select the specific districts that you want by selecting the districts button (next to the precincts button).

District Table: A listing of all the districts that are associated with the voters.

Voter History Table: A listing of every election that people included in this PSR have voted in.

Officials: A listing of their officials.

Petitions: A listing of the petitions that they have signed.

Phone Number: Phone number.

Age: Their age will be included, but not their birth date.

History Format

Date Voted: The date that the person voted.

Election Voted: It displays a “yes” if they voted in the election.

Sending Out The PSR

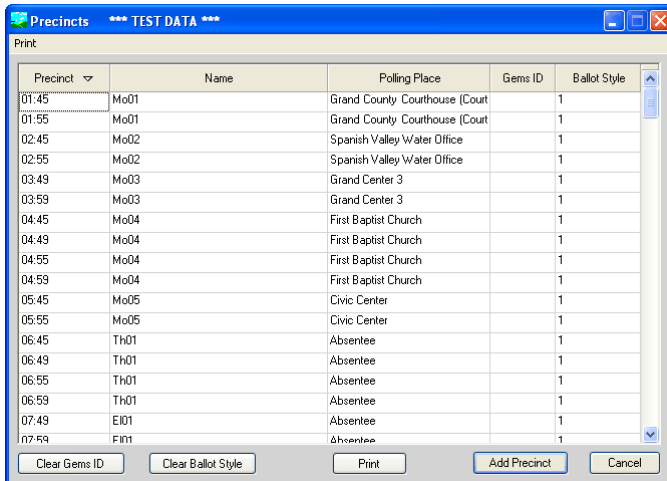
Copy to Sender: If you want it emailed to you, select the sender check box.

Password: You must enter a password that is at least 8 characters long. If the requestor has paid for the PSR in advance you can insert a password that they have given you or you can just insert one of your own and provide it to them.

When: You can choose to send the PSR now or tonight. However, if you want to prepare the PSR, but hold it until you have received payment, select the “tonight” option. You will then select the name of the person requesting the PSR and select the search requestors button. This will take you to a list of every PSR that this person has ever requested. Find the one that you just created and then select “holding” from the status drop down box. When you are ready to release it, select “run now”. This will put it into “hold” until you decide to release the PSR.

Precincts

The image below is of the main precinct management page. This is where you will add, modify and delete precincts. It is also where you will go to assign ballot styles for elections and GEMS id numbers. To detailed information on a particular precinct simply double-click any of the precincts to enter. The information detailed precinct information screen dictates what you see on the main page.



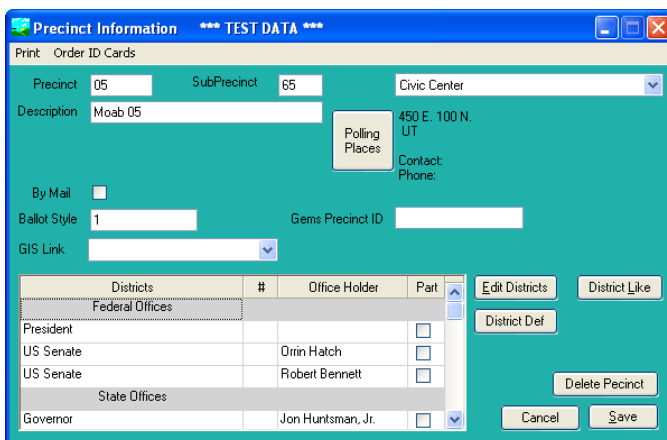
Precinct	Name	Polling Place	Gems ID	Ballot Style
01:45	Mo01	Grand County Courthouse (Court		1
01:55	Mo01	Grand County Courthouse (Court		1
02:45	Mo02	Spanish Valley Water Office		1
02:55	Mo02	Spanish Valley Water Office		1
03:49	Mo03	Grand Center 3		1
03:59	Mo03	Grand Center 3		1
04:45	Mo04	First Baptist Church		1
04:49	Mo04	First Baptist Church		1
04:55	Mo04	First Baptist Church		1
04:59	Mo04	First Baptist Church		1
05:45	Mo05	Civic Center		1
05:55	Mo05	Civic Center		1
06:45	Th01	Absentee		1
06:49	Th01	Absentee		1
06:55	Th01	Absentee		1
06:59	Th01	Absentee		1
07:49	El01	Absentee		1
07:59	El01	Absentee		1

Remember! To get a total of voters included in your PSR and find out how much it will cost, select the get totals button after making all of your selections.

To generate the actual PSR, select the create files button.

Modifying Precinct Information: If you wanted to change the name, precinct number, ballot style and polling place of a precinct, this is where you would do it. With the exception of the polling place dropdown box, you change any of the information in the text fields.

In the image below, you can see that our precinct number is 05 and the sub precinct number is 65. When viewed on the main precinct page, it will read 05:65. However, to make it more user friendly, we can put two letters in front of 05. For example, if this precinct was in Cedar City, UT you could put CC05 in the precinct box and keep the 65 in the sub precinct field. It will then read CC05:65 on the main page. Also, make sure to insert a full name description in the description box (i.e. Cedar City 05.)



Precinct: 05 SubPrecinct: 65 Polling Place: Civic Center

Description: Moab 05

By Mail: ☐ Ballot Style: 1 Gems Precinct ID:

GIS Link:

Districts	#	Office Holder	Part
Federal Offices			
President			<input type="checkbox"/>
US Senate		Orrin Hatch	<input type="checkbox"/>
US Senate		Robert Bennett	<input type="checkbox"/>
State Offices			
Governor		Jon Huntsman, Jr.	<input type="checkbox"/>

Buttons: Edit Districts, District Like, District Def, Delete Precinct, Cancel, Save

Assigning a Polling Place to a Precinct: Using the dropdown box, select the polling place that you want to assign to the precinct. If you don't see the polling place that you want, select the polling places button. This screen should look familiar because it is the same screen that you use to set up your election plans.

Creating a New Polling Place: There is only one place that you can go to create a new polling place, but there are two ways to access the page. In our previous example we were modifying a precinct. We then selected the polling place button. This is option 1. You can also go to precincting > polling places > select the add button.

After selecting the add button, insert the necessary information and select save. When you go back to the precinct screen you will now be able to assign the new created polling place to your precincts.

Normal Polling Place: If you might recall, when setting up your election plans, you have a column titled “normal polling place. Whatever polling place is assigned to a precinct on the main precincts page will be the normal polling place. If you want to change the normal polling place for a precinct, make sure to change it on the main precinct management page.

Adding a Precinct: From the main precinct page, select the add precinct button at the bottom of the form. It will take you to the screen picture below. After adding the information and assigning a polling place, select save. Now, you will be able to tie districts to this precinct. Select the district def (short for definition) button.

Precinct Information * TEST DATA *****

Precinct: 05 SubPrecinct: 65 Civic Center

Description: Moab 05 450 E. 100 N. UT

By Mail: ☐ Contact: Phone:

Ballot Style: 1 Gems Precinct ID:

GIS Link:

Districts	#	Office Holder	Part
			<input type="checkbox"/>

Cancel Save

District Definitions: After selecting the district definition button, the following screen pictured below will appear. When associating districts to precincts, you only have to worry about local and municipal offices. State offices will be selected for you. Start by selecting the district type drop down box. In the example below, we have selected county offices. Using the check boxes, select the offices that you want. The county offices that we have selected (see the check boxes) include the county recorder, sheriff, surveyor, judge, and treasurer. If an office only covers part of the precinct, make sure to select the “part” button.

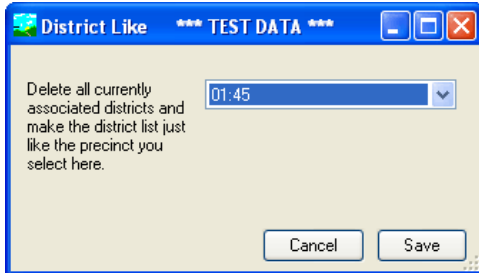
Select Districts * TEST DATA *****

District Type: County Offices

District	#	Select	Part
County Council District #1	1	<input type="checkbox"/>	<input type="checkbox"/>
County Council District #2	2	<input type="checkbox"/>	<input type="checkbox"/>
County Council District #3	3	<input type="checkbox"/>	<input type="checkbox"/>
County Council District #4	4	<input type="checkbox"/>	<input type="checkbox"/>
County Council District #5	5	<input type="checkbox"/>	<input type="checkbox"/>
County Recorder		<input checked="" type="checkbox"/>	<input type="checkbox"/>
County Sheriff		<input checked="" type="checkbox"/>	<input type="checkbox"/>
County Surveyor		<input checked="" type="checkbox"/>	<input type="checkbox"/>
County Treasurer		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Justice Court Judge		<input checked="" type="checkbox"/>	<input type="checkbox"/>

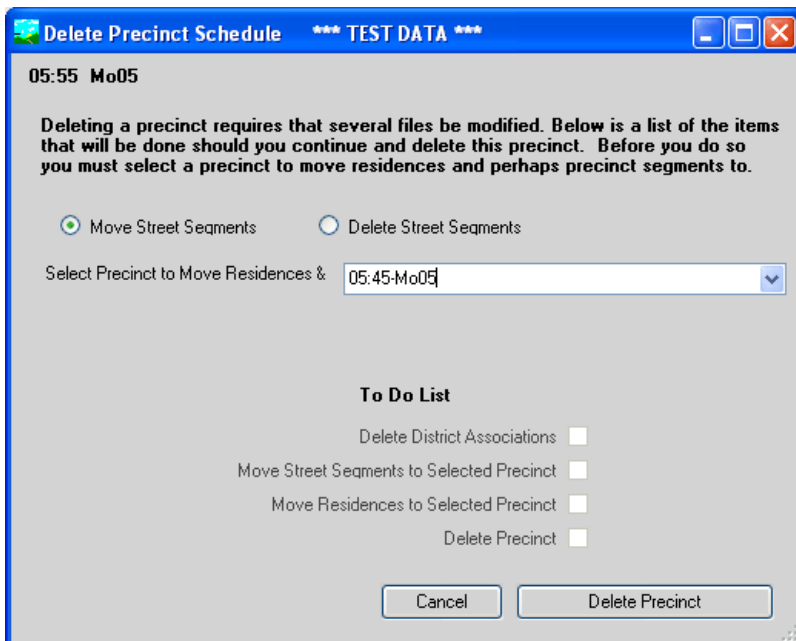
Cancel Save

District Like: When setting up your precinct, you can save some time by selecting the district like button. This option will give you the option of selecting an existing precinct and turning the one that you are creating into an identical match. In other words, if we are creating a new precinct name CC10, we can save ourselves some time by making the district in CC10 look like the districts in CC15. Even if the districts aren't exactly the same, you can still save time by only having to make a couple of modifications, instead of making every selection from scratch.



Deleting a Precinct: You can delete a precinct by going into the detailed precinct information screen and selecting the delete precinct button. However, before you consider deleting precinct, make sure that this is what you want to do because once a precinct has been merged into another the changes cannot be undone.

When you delete a precinct, you have to choose another district to merge the voters into. This ensures that every voter has a precinct. In most, if not all cases you will want to keep the default of “move street segments” selected. This will make sure that all street segment information will be transferred. The most important step in deleting a precinct is to choose the precinct that you want to dump the information into using the drop down box. After making this selection, select the delete precinct button. All of the items on the “to do” list will be performed automatically.



Districts

Adding and Modifying a District:

To add a district, go to Precincting > Districts. Then select the add district button. To modify district information, simply select (double-click) on a district.

The 'Districts' window displays a table of districts and their office holders. The 'District Area' is set to 'County Offices'.

District	#	Office Holder	Phone
CC at Large #1		Judy Carmichael	(435)259-1346
CC at Large #2		Jim Lewis	(435)259-1346
County Assessor		Dorothy Gough	(435)259-1329
County Attorney		Happy Morgan	(435)259-1326
County Clerk		Alex Smith	801-123-4567

Buttons: Add District, Cancel

Insert the appropriate information. This is the information that will appear on the officials report, should someone request a listing of their district officials. The final step included assigning precincts to this district.

The 'District Information' window shows details for the 'County Clerk' district. The 'Number' is 0.

District Name: County Clerk
 Office Holder: Alex Smith
 Address: 11 Candlestick Ave, Newtown, UT 84574
 Phone: 801-123-4567
 Email: asmith@newtown.gov
 Party: Unaffiliated
 Prominence Order: 0
 Area: County Offices

Buttons: Delete, Select Precincts, Save, Cancel

Assigning Precincts to the District: Select the "select precinct button", choose your precincts and save. That's it.

The 'Select Precincts' window shows a list of precincts and selection options. The 'County Clerk' district is selected.

Precinct	Include	Part
01:45	<input type="checkbox"/>	<input type="checkbox"/>
01:55	<input type="checkbox"/>	<input type="checkbox"/>
02:45	<input type="checkbox"/>	<input type="checkbox"/>
02:55	<input type="checkbox"/>	<input type="checkbox"/>
03:49	<input type="checkbox"/>	<input type="checkbox"/>
03:59	<input type="checkbox"/>	<input type="checkbox"/>
04:45	<input type="checkbox"/>	<input type="checkbox"/>
04:49	<input type="checkbox"/>	<input type="checkbox"/>
04:55	<input type="checkbox"/>	<input type="checkbox"/>
04:59	<input type="checkbox"/>	<input type="checkbox"/>
05:45	<input type="checkbox"/>	<input type="checkbox"/>
05:55	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: None, All, Cancel, Save

Selection Options:

- ☐ All Precincts In State
- ☒ All Precincts In County
- ☐ Selected Precincts

Installing and Managing VISTA Local

VISTA Local Installation Procedures

VISTA Local (Electronic Poll Book)

In order to use VISTA Local, you must have a copy of the following downloaded to the computer that you will be using:

- .NET Framework 2.0
- VISTA Local
- Your county's database
- A dongle (security key)

If you already have a copy of the .NET Framework 2.0 on your machine, you will not have to install it again. However, you will need to uninstall the original version of VISTA Local and install the new version, with a new copy of your county's database.

PLEASE READ!

Recommendation: To make the process of managing VISTA Local as easy as possible, please follow the outline below from top to bottom.

Removing the Old Version of VISTA Local

Before every election you will want to remove the .mdb database file and VistaLocal file from your computer first. When removing the old version of VISTA Local, the easiest method is to go to C:\Program Files\VistaLocal and delete the VISTA Local file and database file (.mdb).

Downloading the .NET Framework 2.0

First, download the .NET Framework 2.0. This is done by doing the following:

Step 1: Select the .NET Framework 2.0 link on the VISTA homepage (vista.utah.gov) and then select Run.

Step 2: Lastly, select Run a second time on the prompt that appears. You're done!

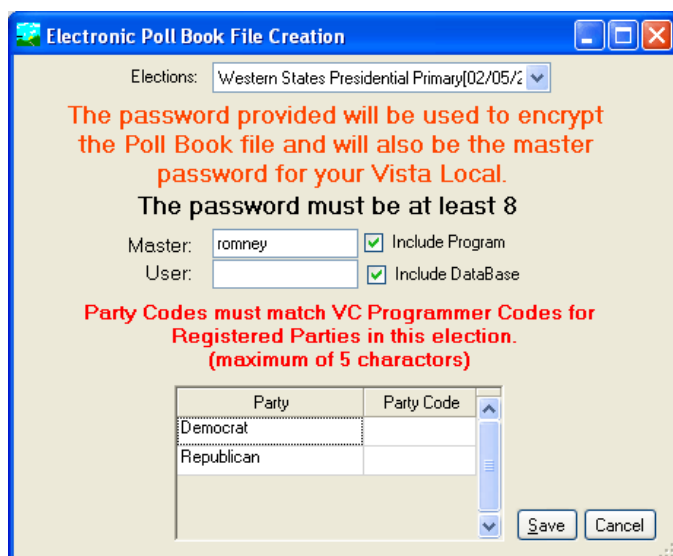
Sending Yourself a Copy of VISTA Local and the Database

You will send yourself a copy of your county's database AFTER you have entered all of your voter information. With VISTA Local, you will only have to send yourself a copy of the database once.

Step 1: In VISTA, go to Utilities > Election Utilities > Create Electronic Poll Book DB. After making this selection, the following prompt will appear below. The most current election will appear in the dropdown box. To change it, simply make a selection using the dropdown box.

Insert a password into the Master Password and User Password fields. The password can be the same for both. If you desire, you will be able to change the either password once it is sent to you and installed on your computer. Finally, select the Save button. A copy of the database and VISTA Local will now be emailed to you.

By default, the Include VISTA Local Program and Include Database check boxes are selected for you. It is recommended that you stay with the default. This will send you the VISTA Local installation, as well as a copy of your database as discussed above.

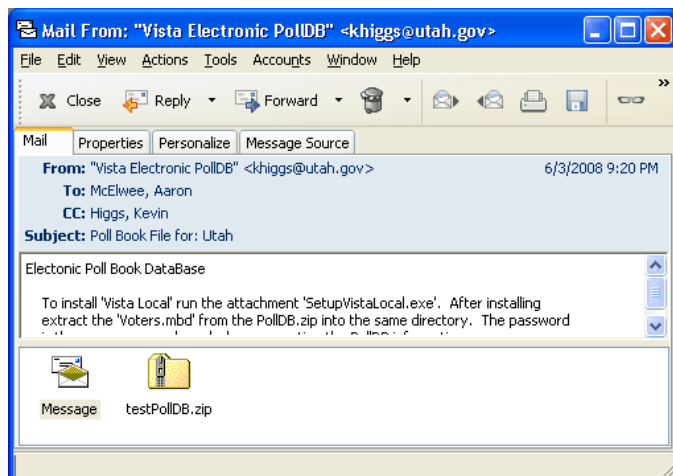


Downloading VISTA Local and the Database (from the Email)

Once you have received the email, you will need to do the following:

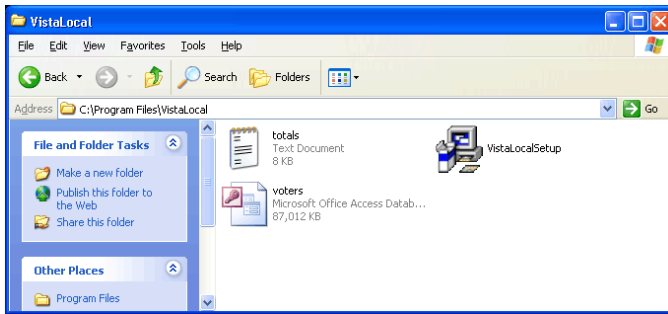
Step 1: Go to C:\Program Files and create a new folder named VISTA Local in this directory. This is where you will save your database and VISTA Local program. There cannot be any spaces in the VISTALocal folder name. The directory should look like C:\Program Files\VISTALocal.

Step 2: Right-click on the PolIDB.zip file (in the email) > select save as (make sure that it is saved in the VISTALocal folder) and select save.



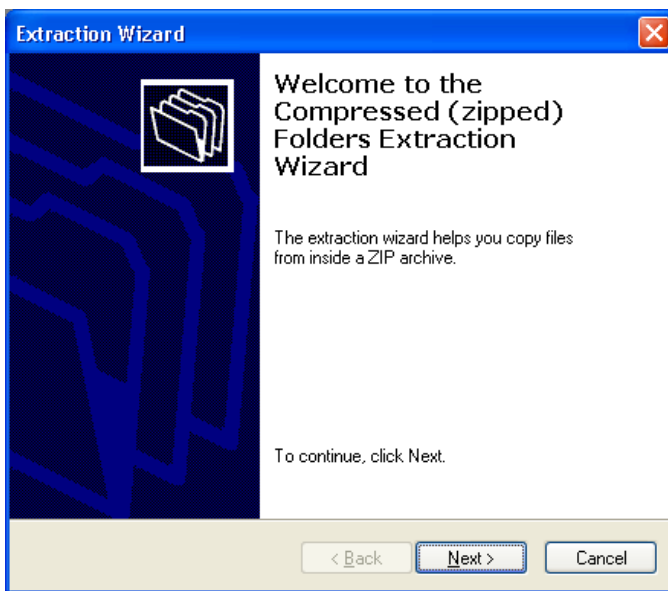
Image

Step 3: Select the PolIDB.zip file once (one left click) > right-click > select extract all.



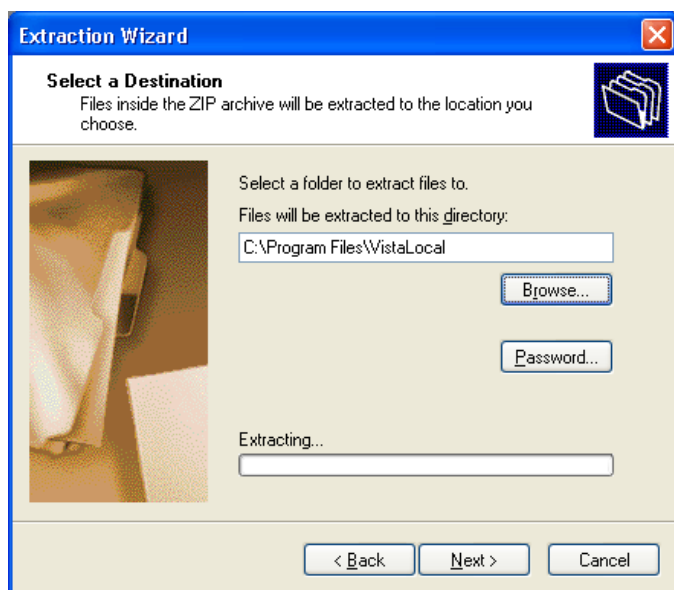
Step 4: The following extraction wizard will then appear. Select the next button.

Aaron McElwee Page - 3 - 10/13/2006

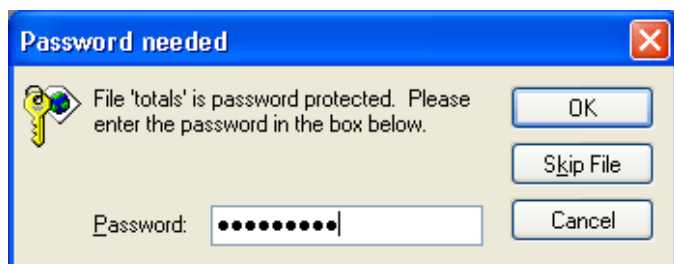


Step 5: Select a destination for the files to be extracted to. In this case, we have selected C:\Program Files\VISTA Local\PollDB, which is the default. DELETE the PollDB portion of the line, so it just reads C:\Program Files\VISTALocal\.

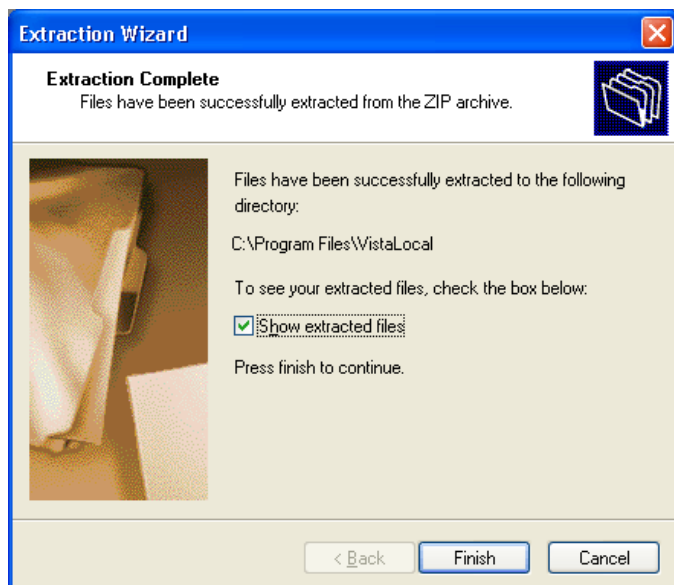
While saving to this location is the recommended method, you can save/extract the files to whatever folder you want. You have to make sure that everything is in the same folder. Then select the next button.



Step 6: The password prompt will appear. Insert the password that you assigned it when you sent yourself a copy of the database and VISTA Local application and select the ok button.

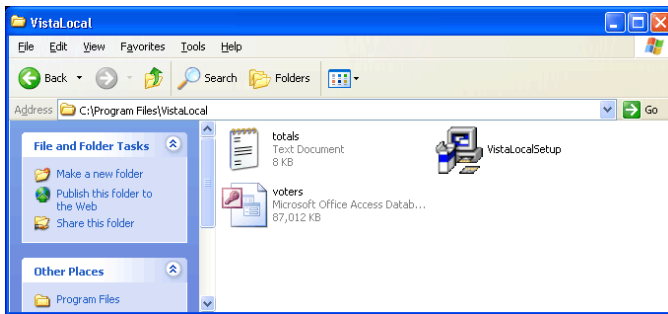


Step 7: Finally, select the finish button.

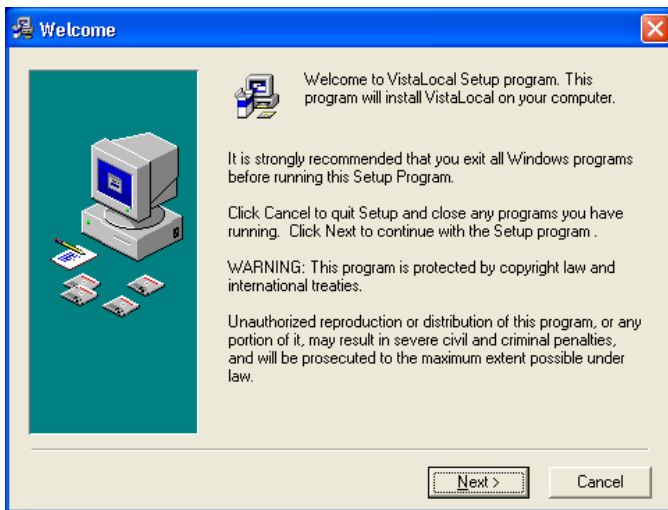


Step 8: Your VISTA Local folder (or wherever you have extracted the files to) will now resemble the image below.

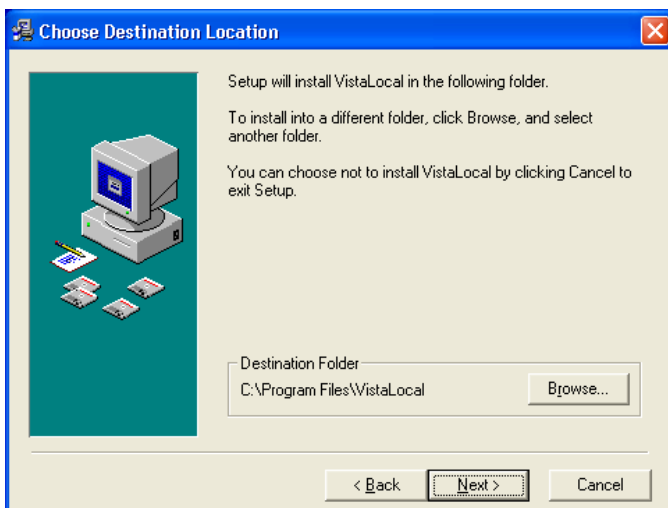
Now, double-click the SetupVistaLocal.exe file. This will install VISTA Local to your computer and place a shortcut to the program on your desktop.



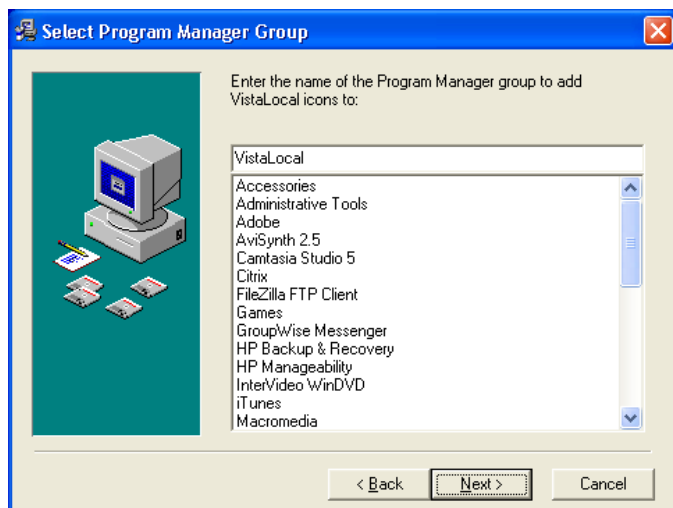
Step 9: After double-clicking the VistsetupLocal.exe file, the following series of prompts will appear. Follow the steps as outlined below.



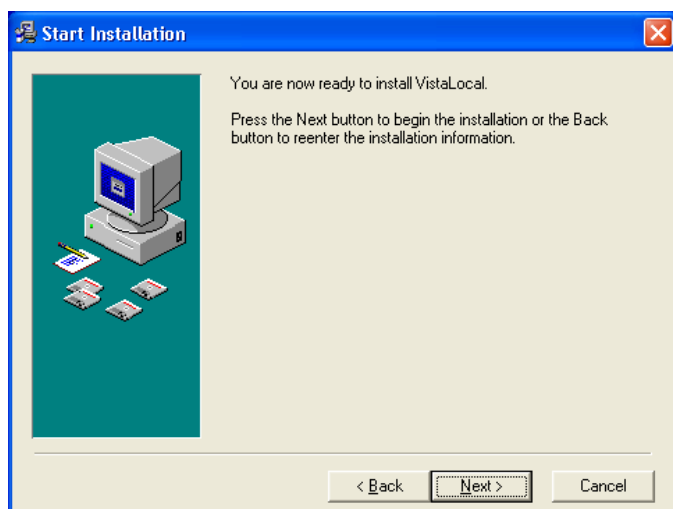
Step 10: You can save the file to the default selection (C:\Program Files\VistaLocal) or to some other place on your computer by selecting the browse button. Wherever VISTA Local is saved to, that is where you will have to save the database file as well, so make a note of where you are storing VISTA Local if it is in any other place than the recommended default selection.



Step 11: Select Next



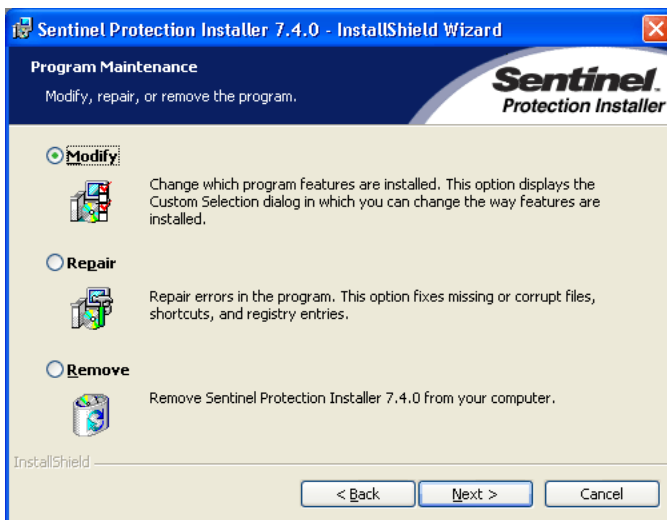
Step 12: Select Next (again)



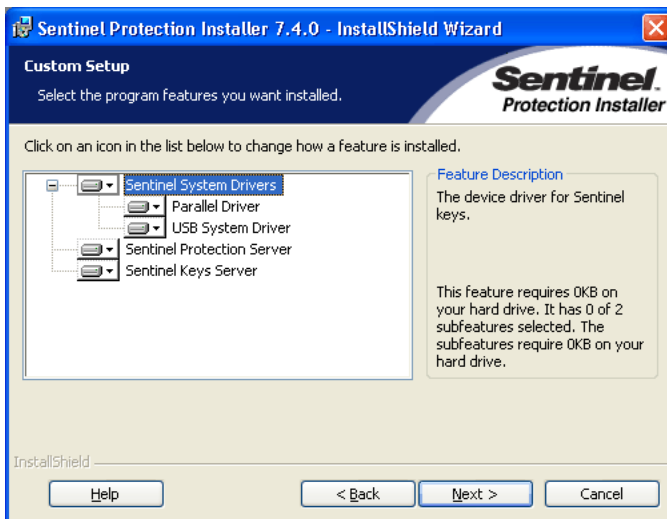
Step 13: This will install the necessary files for the dongle. Select the next button.



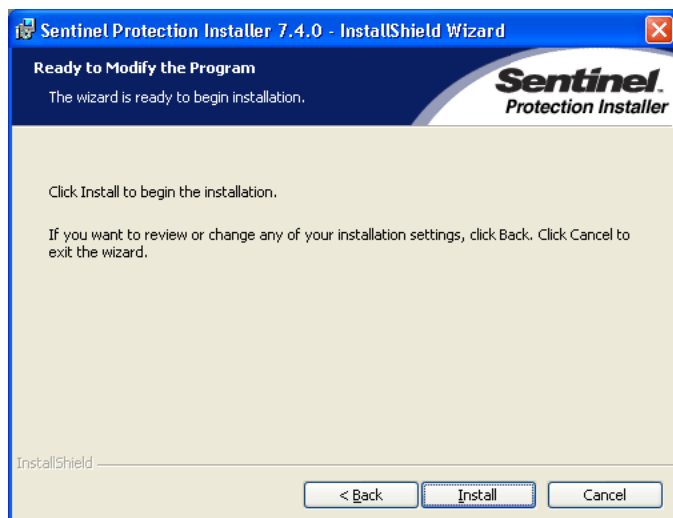
Step 14: If you already have this on your computer, you will see this screen. Select Modify and the next button. If you do not see this screen initially, do not worry about it.



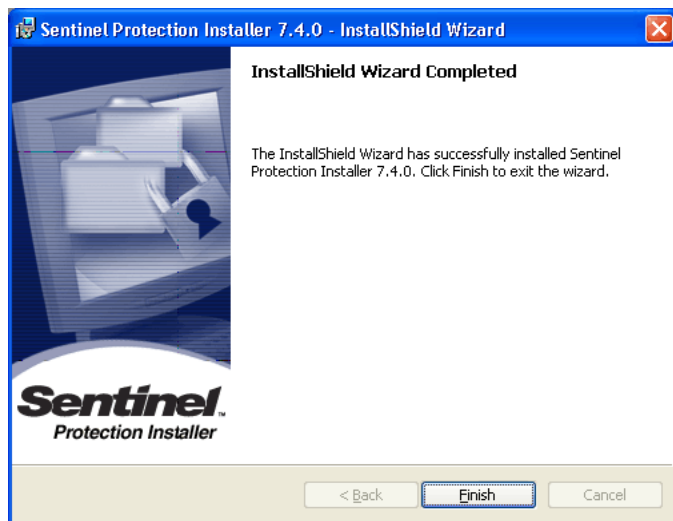
Step 15: Select the next button



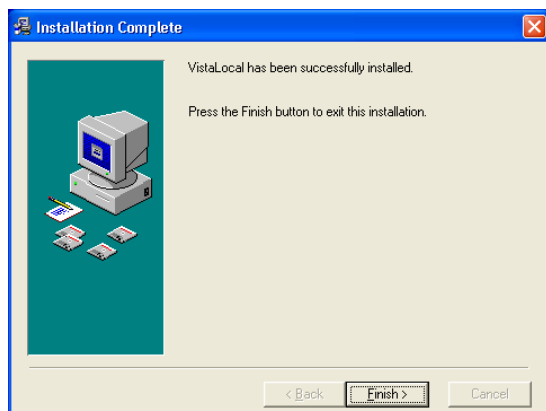
Step 16: Select the install button.



Step 17: Select Finish and then close the screen that says VISTA Local.



Step 18: If this screen was hidden under the Sentinel installation screens, please make sure to select "finish".





If you are going to install VISTA Local on other machines, you have a few installation options.

1. You can save the zipped files contained in the email that you sent yourself to a jump drive and then install them on the machine(s) that will be running VISTA Local. With this option, you will then have to extract the files from the zipped folder for every installation.

- Please read!**

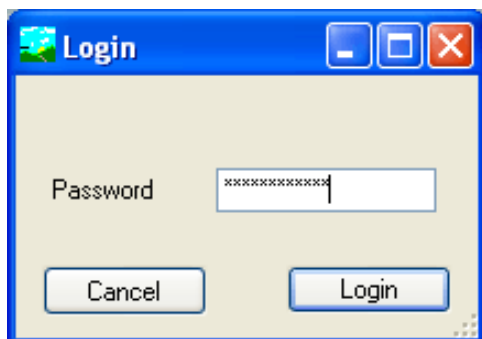
While you will have VISTA Local, a copy of your database and the .NET Framework 2.0 saved to your computer (C:\Program Files\VistaLocal), you can also burn a copy of these files to on your system and burn them to a disc. You must have these three files installed on any computer running VISTA Local and in your VISTA Local file (whether it is in the C:\Program Files\Vista Local)

After every election, you will be required to send yourself a copy of the VISTA Local application with your county's database. Make sure to delete the old .mdb (database file) and everything else in the VISTA Local folder first. Then extract the new files contained in the email to the VISTA Local folder.

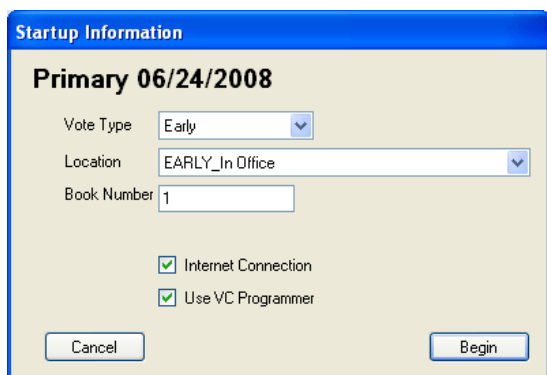
As stated earlier, to use VISTA Local, you will be required to use a dongle, which is a security device. A dongle is required for each computer running VISTA Local. If the dongle is not plugged into your USB port, VISTA Local will not run. Think of a dongle as a key to a car or home. Without it, you won't be starting your car or getting into your home.

Opening VISTA Local (Taking the car out of the driveway)

1. Plug your dongle into the USB port of your computer.
2. Double-click on the VISTA Local icon on your desktop.
3. It will ask you for a password (the one that you assigned it when you emailed the database and VISTA Local application to yourself. Enter and select the login button.



4. After inserting your password, select the location of where the dongle is being used (i.e. Capitol), the book number that people will be signing at the poll and if you are going to have an internet connection. If you are going to have an internet connection, select the internet checkbox. If not, leave it blank. Select Begin.



Remember! When it comes to early voting, make sure to set up an early polling place in your election plan before exporting the database. If you don't, you won't see an early polling place.

Internet Connection: In most cases, you will want to keep the internet connection check box checked. This will ensure that your database will be updated on a regular basis.

Remember: If for whatever reason you did not select the internet connection check box when logging in initially, you can establish a connection to the internet by quitting the program, logging back in and making sure that the internet connection check box is selected. When you are connected or have a connection to the database at anytime throughout the day, the VISTA database will be updated with your VISTA Local changes every ten minutes.

If you are planning on setting up a network of computers at a polling place, the computer that contains the database will have the check box selected. The other computers that are pointing to it will not have this option selected and will only have VISTA Local installed as well. The other computers running VISTA Local don't require the database.

If you are in a polling place that doesn't have an internet connection, you can still record votes and issue ballots, but you won't be able to update your county database or any other machines using VISTA Local until you reestablish a connection.

5. You now have access to VISTA Local.

Remember: If you logged into VISTA Local with your master password, you will be able to change it and the user password. If you logged into the system using the user password, you will not have the ability to change passwords.

Finding a Voter and Recording Voting History

When searching for a voter, you can use their full name, partial pieces of their first and last name, voting status or simply select a precinct from the precinct dropdown box. You can enter information in all of these fields at once and search as well. After entering information and/or making a selection(s), select the Search button or Enter on your keyboard. If they are registered and eligible to vote, their name will appear in the table below.

When you see the voter's name, simply double-click on it and insert the line of the book that they signed and select the record button. When the next person comes to vote, the next line number will automatically appear.

V	A	ID	Name	Address	Precinct	Style	Gems ID	Party
<input type="checkbox"/>	<input type="checkbox"/>		Adamson, Andy C	311 S 400 E, American Fork	AF01	1	10.0	Republican
<input type="checkbox"/>	<input type="checkbox"/>		Adamson, Darrel Dean	49 N 370 E, American Fork	AF01	1	10.0	Republican
<input type="checkbox"/>	<input type="checkbox"/>		Adamson, Heather D	533 S 400 E, American Fork	AF01	1	10.0	Unaffiliated
<input type="checkbox"/>	<input type="checkbox"/>		Adamson, John L	311 S 400 E, American Fork	AF01	1	10.0	Republican

Select the record button to record the vote.

Remember: After recording that a person has voted, you only have 90 seconds to make a change to their record. If for whatever reason you have to reverse what you have done (within the allotted 90 second time frame), double-click on their record again and select the yes button.

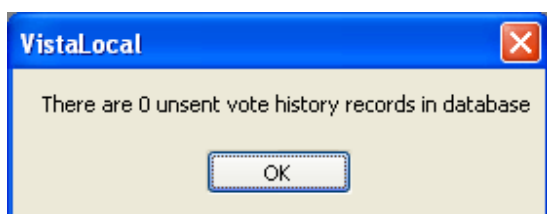
Updating the VISTA Database

If you have an internet connection, all changes that you have made (recording voter history) will be sent to the VISTA database every 10 minutes. If there are other machines at multiple polling locations running VISTA Local (and they have an internet connection), their databases will be updated with your changes (and vice versa).

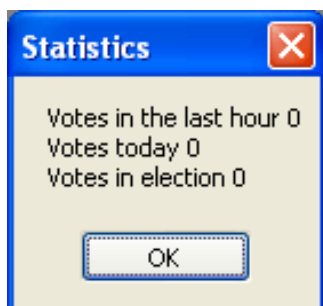
If you do not have an internet connection at the polling place, you will be able to upload all of your changes from the day to the database, when you return to the office or are in a place that has an internet connection.

Remember: Although the changes from other locations will be saved to your VISTA Local database, they won't appear on your screen until you search on another person and select the Search button. Searching on a new person will refresh your screen.

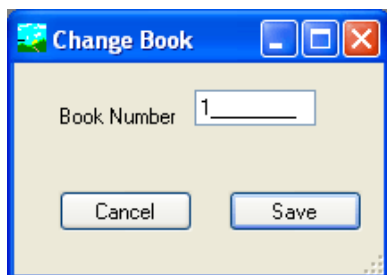
Additional Options in VISTA Local



Verify Sync: On the voter search screen, select the verify sync button for a total of voters that are waiting to be uploaded to the database.



Statistics: This will let you know how many votes have been recorded in the last hour, the day and in the overall election.



Change Book: To change the number of the poll book that you are using, select change book and make the appropriate change.

Using VISTA Local to Format Voting Cards: To be used in electronic voting machines

After you have recorded voting history for an individual, VISTA Local will create a file that the VC card reader will pick up. This feature in VISTA Local will allow the VC Reader to format the voting card with the appropriate ballot style. For this to work, you must have the exact ballot number given to you by Diebold inserted into the ballot style section in VISTA.

To set your precinct up in VISTA, go to Precincting > Precincts > Select a precinct > Insert the ballot style in the ballot style field and select save. You will want to do this for all of your precincts.

Don't Forget: The VC reader must be on the same machine that is running VISTA Local to work. In addition, before you start the process, make sure that the middle browse section of the screen has C:\Program Files\VISTALocal\VoterCard.txt selected.

Creating the Ballot With VC Reader

Step 1: Place the voter card in the VC Reader

Step 2: Record the voting history (double-click on a person's name) in VISTA Local.

Step 3: Select the create card button on the VC Reader screen.

Step 4: Provide the voter with the card that has just been formatted.

Step 5: When the voter inserts the card into the electronic voting machine, their ballot style will then be displayed on the screen.



Election Night Reporting: Sending Your Results

Pre-Election Night Preparation

This document will take you through the step by step process of setting up your GEMS software before election night to ensure that all of the reporting requirements are met. You will need to make sure that the set up on your screen looks identical to the image below. In other words, whatever fields are checked on the image below, make sure that you have the same fields (i.e. check boxes) selected on your monitor.

To set up GEMS, please do the following:

1. Open the GEMS software.
2. Select the election you are running and either select the open button or double-click the election.
3. You will then be asked to insert your username and password used to set up the election
4. On the election admin host screen select "Election", (upper left).
5. Select "Export Results",
6. Select "Export Results" again.
7. On the Export Formats screen select "Standard Export" and click the "Ok" button.
8. On the "Standard Export Formats" screen click the "New" button.
9. On the "Edit Standard Results Export Format" screen please do the following:
 - > Change the "Label" field to "Utah State Export"
 - > Insert your county code (1-29) into the "County Code" field
 - > Change the selections, using the check boxes, to match the following example below.
 - > Finally, select the "Ok" button.

(Please note, you must scroll down to make the necessary changes after the "Cand Label" in GEMS.)

Edit Standard Results Export Format

Label: Standard Export

County Code: 3 Field Delimiter: , ☒ Quote Strings

Export Results For:

☒ Election Summary ☐ Precincts Counted ☐ Counter Group Detail

☐ Individual Precincts ☒ Use Polling Counter For Precincts Reporting

Reporting Set: All Races

Row Definitions:

	Incl.	Export
Candidate	<input checked="" type="checkbox"/>	
Write-Ins	<input checked="" type="checkbox"/>	
Times Counted	<input type="checkbox"/>	
Times Blank Voted	<input type="checkbox"/>	
Times Over Voted	<input type="checkbox"/>	
Num. Under Votes	<input type="checkbox"/>	
Num. Pcts. Counted	<input checked="" type="checkbox"/>	
Num. of Pcts	<input checked="" type="checkbox"/>	
Registered Voters	<input checked="" type="checkbox"/>	

Column Definitions:

	Incl.	Type
County Id	<input checked="" type="checkbox"/>	Default
Rpt. Pct. Id	<input checked="" type="checkbox"/>	Default
Rpt. Pct. Label	<input checked="" type="checkbox"/>	Default
Rpt. Pct. ExportId	<input type="checkbox"/>	Default
Race Id	<input type="checkbox"/>	Default
Race Label	<input checked="" type="checkbox"/>	Default
Race ExportId	<input checked="" type="checkbox"/>	Default
Race VGroup1 Id	<input type="checkbox"/>	Default
Race VGroup1 Label	<input checked="" type="checkbox"/>	Default
Race VGroup1 ExportId	<input type="checkbox"/>	Default
Race VGroup2 Id	<input type="checkbox"/>	Default
Race VGroup2 Label	<input type="checkbox"/>	Default
Race VGroup2 ExportId	<input type="checkbox"/>	Default
Cand Id	<input type="checkbox"/>	Default
Cand Label	<input checked="" type="checkbox"/>	Default
Cand ExportId	<input checked="" type="checkbox"/>	Default
Cand VGroup Id	<input type="checkbox"/>	Default
Cand VGroup Label	<input checked="" type="checkbox"/>	Default
Cand VGroup ExportId	<input type="checkbox"/>	Default
Counter Group Id	<input type="checkbox"/>	Default
Counter Group Label	<input type="checkbox"/>	Default
Counter Group ExportId	<input type="checkbox"/>	Default
Count	<input checked="" type="checkbox"/>	Default

OK Cancel

- | | |
|--------------|----------------|
| 1. Beaver | 16. Piute |
| 2. Box Elder | 17. Rich |
| 3. Cache | 18. Salt Lake |
| 4. Carbon | 19. San Juan |
| 5. Daggett | 20. Sanpete |
| 6. Davis | 21. Sevier |
| 7. Duchesne | 22. Summit |
| 8. Emery | 23. Tooele |
| 9. Garfield | 24. Uintah |
| 10. Grand | 25. Utah |
| 11. Iron | 26. Wasatch |
| 12. Juab | 27. Washington |
| 13. Kane | 28. Wayne |
| 14. Millard | 29. Weber |
| 15. Morgan | |

VISTA > Making Every Vote Count

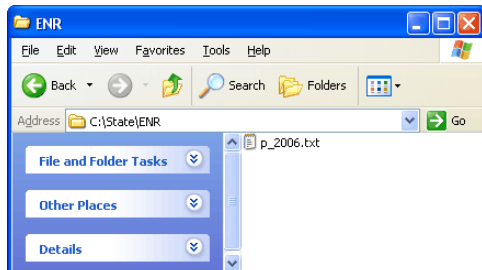
Election Night Reporting-Saving and Submitting Your Results

Step 1 (Saving the File in GEMS)

1. Open the Gems software
2. Select the Election you are running
3. On the election admin host screen select "Election", (upper left)
4. Select "Export Results", then "Export Results" again
5. On the Export Formats screen select "Standard Export" and click the "Ok" button.
6. On the "Export Formats" screen select "Utah State Export" and click the "Ok" button
7. On the "Save as" screen, select a removable drive and name the "election type_election year" file P_2006, which denotes the 2006 Primary. For all other elections, examples would include: "G_2006" (for the 2006 General Election) and "S_2006" (for a 2006 Special Election).
8. Finally, save the export to your removable drive and then transport it to a computer that has VISTA installed on it.

Step 2 (Saving Your Results to VISTA)

1. Remove the removable drive that contains the export file and install it on a machine that has VISTA installed, open and running. Again, please make sure that VISTA is open.
2. On the "Voter Information and State Tracking Application" screen select "Elections" and then select "Election Results". When the election results screen appears, you will want to leave it open for the duration of the election.
3. Save the export file to local path "C:\State\ENR". If this folder does not exist, you will have to create it. When a new Election file is placed in the ENR folder ("C:\State\ENR"), VISTA will automatically move that file to the state.



4. Now repeat that step roughly every 5 minutes, until you have completed the process of submitting voter results.

Tracking the Precincts That Have Reported and Submitting Results

5. To ensure that your updates are being transmitted, keep this screen up throughout the election. It will also let you know how many of your precincts have reported. Go to elections > election results to access this screen. After placing your text file into the C:\State\ENR folder, select the send report now button. It is extremely important to note that once you have uploaded your last file of results to select the count complete button. This will let us know that you are done and that we shouldn't be expecting any additional files.

19	San Juan	Amber Young	435-587-2376	12:53:21 PM	20	0	<input type="checkbox"/>
20	Sanpete	Chad Roberts	435-835-2131	11:11:36 AM	29	0	<input type="checkbox"/>
21	Sevier	Steven C. Wall	435-893-0401	2:28:01 PM	23	0	<input type="checkbox"/>
22	Summit	Kent Jones	435-336-3203	12:13:16 PM	42	0	<input type="checkbox"/>
23	Tooele	Holly Shields	435 843-3143	9:22:05 AM	58	0	<input checked="" type="checkbox"/>
24	Uintah	Mike Wilkins	435-781-5362	1:13:03 PM	26	0	<input type="checkbox"/>
25	Utah	Jolynn Parker		5:26:04 AM	246	0	<input type="checkbox"/>
26	Wasatch	Cal	435 671-2833	6:52:17 AM	27	0	<input type="checkbox"/>
27	Washington	Melanie	435-705-9266	1:44:47 PM	91	0	<input type="checkbox"/>
28	Wayne	Ryan Torgerson	435-836-1300	5:57:46 AM	8	0	<input type="checkbox"/>
29	Weber	Terry Call	801-399-7412	1:53:38 PM	770	0	<input type="checkbox"/>
30	Totals				2831	0	<input type="checkbox"/>

